Version 5

Teacher's Manual

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Alexandria

i) Preparation

A. Read the entire teacher's manual before training and PRACTICE, PRACTICE, PRACTICE the presentation beforehand.

Your attendees will appreciate the training more if you are prepared and know your material thoroughly.

B. Arrange a date and time.

Normally training will last 7 hours but should be scheduled for approximately 8 1/2 to allow for two 15-minute breaks and a one hour lunch.

C. Verify the number of attendees.

The best training is usually done in small groups, generally 12 people or less per session. If more than 12 people are to be trained, either divide the users by ability and perform multiple sessions or match new users with advanced users who can help them master the basics and stay on task.

D. Arrange a location.

Ideally training will be done in a lab or library with enough computers for only 1-2 people per computer. Make sure that you and the attendees know how to get to the training site. If driving to the training site, ask before hand about parking to ensure that you park in a reasonable location that will not require leaving class to attend to parking meters or to move your vehicle.

E. Verify that the computers meet the minimum requirements.

(Macintosh: OS 8.6, Power PC or G3 processor, 64 MB RAM is recommended, but smaller collections will run with 32 MB RAM. PC: Windows 95, 98 or NT, Pentium 100 MHz, 32 MB RAM.)

F. Install the demo on the computers before the attendees arrive.

Be sure to arrive with sufficient time to install. It will generally take 30 minutes to install on 12 machines. If you will be installing the demo personally, verify that no security software will prevent installation or ask that someone with the appropriate security clearance be in attendance to disable the security. If necessary, send the demo ahead and have a technician or a librarian install before you arrive.

G. Prepare and provide sufficient materials for each attendee.

Each attendee should receive a training manual and a circulation commands sheet (with command barcodes). Optional: an evaluation form and the trainer's business card.

H. Provide either name tents or name tags for attendees.

Name tags or name tents are very beneficial for the trainer and the attendees to learn each another's name. Name tents are made by folding a piece of paper in thirds; the attendees should write their names on two sides of the paper and stand the tent on the computer monitor.

Preparation

1) Introduction

Estimated teaching time: 1/2 hour

A. Introduce yourself.

State your name and position. Provide some personal information such as education, how long you have been in your position, and computer and library experience.

B. Introduce the subject of the class - Alexandria 5 Basic Training.

C. Have the class introduce themselves.

Ask each attendee to also indicate the library they work for, the position each holds, and what experience they have with the Alexandria automation system (i.e. how long have they used it and to what extent). Also ask each person to rate their general computer skills for Macintosh or Windows - which ever is appropriate for the class. This information will help you know which attendees may need more attention and how in-depth your computer introduction should be.

D. Discuss the training outline.

Basic training covers circulation, holds and reservations, lost and damaged items, adding and modifying patron records, adding and modifying item records, searching the catalog, running reports, and adjusting policies and preferences. A standard class will have two 15 minute breaks, one in the morning and one in the afternoon, plus one hour for lunch unless other arrangements have been made. Feel free to ask questions, but understand that they may be postponed to a more appropriate time in the schedule, or, if particular to your library only, may have to wait until a break.

E. Discuss the training manual.

The training manual is divided into chapters. Each chapter has an outline of the topics to be covered and possibly some notes on the first page. On the back of the chapter outline is a "Let's Practice" Section where the attendees can try their new skills and the trainer can assess the training and the attendees' understanding. Following the "Let's Practice" is a "Hints" section. "Hints" are step-by-step directions to perform the "Let's Practice", but the "Hints" are general enough for use in their own library. Cover Page also has pertinent information on the back such as COMPanion's address, phone numbers, fax number, email addresses, and web site. Also note the copyright statement. Copies can only be made with COMPanion's permission.

F. State the following:

Before actually training on Alexandria, I want you to recognize some very important issues. First, microcomputer technology is very new and very complex. Many different elements and areas are involved and, if each area or element does not perform in the correct way, problems can arise. Problems can be caused by physical materials used in the computers, the electricity that powers the computers, the hardware design, the operating system, the Alexandria software or other software programs that are running, or even by user-error. As such, there are seven safety measures you can take to protect your data and to save yourself time and heartache.

1. **BACK UP, BACK UP, BACK UP, BACK UP.**

   COMPanion recommends a minimum of FIVE backups. Backups are complete copies of your Data folder to some external medium. They could be on Zip disk, SuperDisk, Jazz disk, another hard drive, a file server, or a tape. You should keep at least one backup per day of the week. Keeping more backups will never be discouraged.

   You do not need to back up the software. COMPanion can replace the software if your library is current on its support subscription. COMPanion cannot replace your data so BACK IT UP.

   It is also highly recommended that at least one copy of your data be kept off-site (i.e. take the Friday backup home). Libraries have been burglarized and all computer equipment, including the backups, have been stolen. Libraries have also burned down and the backup has been instrumental in obtaining a quick and acceptable settlement with the insurance company.

2. **Perform standard machine maintenance.**

   Ideally every machine should be scanned monthly for viruses and for file damage. On Windows, a defragmentation on the hard drive should also be done regularly. Run either **Norton Disk Doctor** (Macintosh) or **Scandisk** (PC) on a frequent basis. Alexandria cannot be expected to run correctly when the operating system or file structure is damaged.

3. **Perform Alexandria maintenance.**

   Every month you should run **Rebuild** on your database. It can only be run from the **Data Station** and can take hours to days to run depending on the strength of your machine and the size of your collection. **Rebuild** checks that the indexes used for sorting, browsing, and selecting match the data, that the records are keyworded appropriately, and that the status counters are correct. Always back up before running **Rebuild** or any other major utility or import. REMEMBER: if it will take longer to correct a problem caused by a bad import or running a utility incorrectly than it will take to back up, you should back up before doing it.

   To run Rebuild:

   - From the **File** menu, select **Utilities**.
   - Using the **Utility Type** drop-down menu, choose **Database**.
   - Under **Operation,** select **Rebuild**.
   - Click on **Run**.

4. **Have a UPS (uninterruptable power supply or battery backup) on the Data Station and test it.**

   Alexandria 5 uses client/server technology for its communication and operation procedures. The server program, called the **Data Station**, must be running in order for any clients, also known as workstations. To search, circulate, run reports, etc. for Alexandria there are two types of workstations, **Alexandria Librarian Workstation** or **Alexandria Researcher Worsktation**. *If the Data Station program is not running, NO ONE can view or change the data.*

   In addition, the **Data Station** does all the work with the data; the clients just ask the **Data Station** to perform procedures. *As such, the Data Station should be on the best machine available.*

Since the **Data Station** does all the work, it has the ability to prioritize requests from the clients. Some procedures will be postponed temporarily while other more pressing procedures are addressed. The Data Station will, therefore, hold some things in memory to take care of when it is not so busy. *If there is a power brownout or a power outage, your data can become corrupt if you do not have a UPS to protect it.*

A UPS is an Uniterruptable Power Supply and is only meant to give you enough time to get to the Data Station, quit it, and shut down the machine appropriately. *Do not connect unnecessary machines or appliances to a UPS since they will drain critical energy from the UPS in your time of need. (In case of an extended power failure during weekends it is essential that you back up your data before leaving.)*

5. **Enable Security.**

   The Alexandria program comes without any security turned on. As such, unless you install an additional security program or enable security within Alexandria, anyone can launch Alexandria and have full privileges that would allow them to add, remove, and change patrons, items, orders, budgets, vendors, subscriptions or routes or to check items in and out, assign and forgive fines, etc. It is strongly recommended that you enable security within your Alexandria preferences.

   In addition, without some form of system security, if your Data Station is publicly accessible, someone could delete, more, or rename your data file. If the Data Station will be publicly accessible, it is strongly recommended that you install and enable a system security program. Some operating systems come with such security built in.

6. **Watch your screen at all times.**

   Although Alexandria does have audio clues to alert you to special circulation and program messages, those audio clues do not help if the speakers are turned off, the volume is turned down, sounds are disabled in the program, sound is disabled in the operating system or if headphones are plugged in. Alexandria is also streamlined for certain procedures based upon assumptions that are often made in the library environment. Those assumptions may differ from what you desire. *ALWAYS, ALWAYS, ALWAYS watch your screen.* Verify that you have fully read the messages and that what you thought you did was exactly what the program claims you did.

7. **When in doubt, contact Technical Support.**

   If your library is current on its support subscription, when you have a problem or a question, please contact Technical Support. You can call Technical Support 24 hours a day, 7 days a week, 365 (or 366) days of the year. Questions regarding passwords and registration codes may need to be postponed until business hours.

   During the busy time of the year (beginning of school, beginning of the calendar year, and inventory season), you may get the receptionist if Technical Support is currently helping other customers. The receptionist will take the name of your library, its telephone number, your name and the state you are calling from and send that information to Technical Support in an email. They will contact you as soon as they are available.

   Or you can email Technical Support directly from Alexandria 5. Emailing from the program not only sends your message or question to Technical

Support, but also information on your machine, its hardware, memory, your data and the version you are running.

To email Technical Support on Macintosh:

- Choose **Tech Support** under the **Apple** menu.
- Type desired message in the window provided on the **Send Email** tab.
- Click **Send Message** to send the message to Technical Support.

To email Technical Support on Windows:

- Choose **Tech Support** under the **Help** menu.
- Type desired message in the window provided on the **Send Email** tab.
- Click **Send Message** to send the message to Technical Support.

You cannot email Technical Support if you do not have a return email specified in your **Library Information** preferences and if you do not have an internet connection.

2) Circulation

Estimated teaching time: 1 hour.

Estimated time for Let's Practice: 5 minutes.

Circulation is the main window of Alexandria. Before proceeding to teach circulation, have the attendees view the window to familiarize themselves with the layout.

A. Menu Bar.

1. **File.**

   Note that you can create a new word processing document, open a file, save a file, save a file as text, import a file, run utilities, print, restart and quit Alexandria from the **File** menu.

2. **Edit.**

   Here you will see the standard editing options of **Cut, Copy, Paste, Undo, Redo, Find,** and **Preferences**. We will look at **Preferences** at the end of the class.

3. **Show.**

   All major database modules are located under **Show.** Choose **Patrons** to add and modify patron records. Choose **Items** to catalog books, videos, and equipment. **Subscriptions** and **Routes** are for magazines. **Orders, Budgets** and **Vendors** are for acquisition purposes. Also notice the hot keys that are listed on the right of the **Show** menu. From anywhere in the program these hot keys will open the indicated module. Nothing is more than three clicks away in the program, but it could be extremely shorter with hot keys.

4. **Reports.**

   All reports in the program are located here except for **Patron** and **Item Details**, **Patron History** or the **Unused Barcode Report**. You can run barcodes from these reports, print lists, and notices.

5. **Links.**

   This is a launcher. Just place any program or document (or its shortcut or alias) you want to be able to launch on this machine to the **Link Menu** folder and it will appear here. (One suggestion is to copy the electronic manual to the **Link Menu** folder. It can then be accessed from within Alexandria and since it is in electronic format, it can be searched. The electronic manual is always the most up-to-date manual available. You should download or install the most current version regularly.)

6. **Circulation.**

   This menu option changes names and options depending on the window that you are viewing. If **Circulation** is the currently active window, then the menu will be called **Circulation** and have special circulation functions. If the **Patron** window is currently active, this menu will be called **Patrons** and have commands appropriate for patron functions. If the **Item** window is currently active, this menu will be called **Item** and have commands appropriate for item functions.

7. **Window.**

   Every currently open window will appear under this menu. If you have several saved lists from searching that you are working with but you cannot view them all at once, you can find them under the **Window** menu and use it to switch between windows.

8. **Help.**

   Here you can view the release notes or the **Alexandria Help**. (On Windows, you can also email Technical Support from here. On Macintosh, you can turn on balloon help.)

9. **Apple. (Macintosh only)**

   Here you can email Technical Support and view the Alexandria splash screen which lists the version you are running.

B. Circulation Window.

1. **Circulation mode.**

   Located at the top left. It is the procedure or process that the program is ready to perform.

2. **Command line.**

   The white box next to the **Circulation** mode at the top of the window. This is the only place to type or scan information for the **Circulation** window. The words "Enter barcode or command." are a watermark. There is no need to try to delete them from the box.

3. **Help button.**

   Next to the command line. This window provides detailed directions about the **Circulation** commands listed on the command sheet you were given. If you would like to learn how to place holds or reservations, change patron locations or copy locations from the **Circulation** window, you can click on the help, find the appropriate command, read the description and begin the process from the **Help** window.

4. **Current Patron pane.**

   Shows the patron whose record is being viewed or modified.

5. **Current Item pane.**

   Shows the item and copy record which is currently being viewed or modified.

6. **Transaction Log.**

   Visible on the bottom half of the window. It is a running record of the transactions or changes made to the database. You cannot change anything in the log. If you make a mistake, you can correct it, but you cannot delete it from the log, just like you cannot go back in time and undo a mistake. Clicking on a patron or item in the log does not make that patron or item visible or current.

7. **Miscellaneous.**

   Current date and time and the number of transactions appear at the bottom of the window.

8. **Override date.**

   If entered, it will appear in red next to the current date and time.

C. Check In / Out.

To check out an item:

- Make sure the mode is set to **Check In / Out.**
- ALWAYS bring up the patron first (even though in real life the patrons usually hand you their items before they give you their library cards or tell you their names).
- Set the override date if necessary.
- Type or scan the barcodes of the items to check out.
- Respond to any circulation alert messages that appear.
- When typing barcodes rather than scanning barcodes, always follow the barcode with an **<enter>**.
- When finished using an override date, clear it by typing **. <enter>**.

1. Check out *World of Science* **(3187) to Camille Arnold (1003).**

Look at Camille's record in the **Current Patron** pane. It shows her name, her barcode, the policy she is on (9th grade), her location (or homeroom) and her picture. It also shows a summary of her account - how many copies she has checked out, how many of those copies are overdue, how many holds, in-stock holds, reservations and reserves she has, and the total amount she owes in fines.

If you would like to change the **Location** term, homeroom, to something else like teacher, room number, location, district, department, cell, etc., you can change it in the **Patron Management** preferences under the **Edit** menu.

Pictures are not required.

Policies govern how many items can be checked out by the patron, for how long, what fines are charged, can holds be placed and if so how many, etc. The demo data has policies for each grade in the demo. Yours may differ. You need a policy for each patron and item group that differs.

Look at the *World of Science* in the **Current Item** pane. It shows the title, the copy barcode, its policy (Non-fiction), the call number, the status of the copy and the status of the title.

Look at the **Transaction Log.** Note that it shows that Camille Arnold at today's date and time, checked out the *World of Science*, barcode 3187. Note the due date at the far right. This due date is calculated by the policies.

2. Check out *Exploring the Sea* **(3064) and** *Mississippi* **(3129) to Rebecca Eckhoff (1032).**

Inform the attendees that as long as the **patron barcodes** are never the same as the **item barcodes**, there is no need to clear the previous patron in order to switch to a new patron. Just scan the new patron's barcode.

If patron barcodes ar ehte same as item barcodes, youo must always put a **P** in the command line before scanning the barcode. It is recommended that you change one of the barcodes to remove the conflict.

Look at the **Transaction Log** and you will see the new entries for Rebecca checking out *Exploring the Sea* and *Mississippi*. The old entry for Camille is

still listed. The Transaction Log will help you when you are interrupted in the middle of a process by patron questions to remember what you did last.

D. Override Dates.

To set an override date:

- First enter the desired mode.
- Then type **.MM.DD.YYYY <enter>**.
- To clear an override date, type **. <enter>**.

3. Check out *The Iceman cometh, a play* **(3430) and A week in the life of best friends (3207) to Jami Stark (1009) until December 30, 2025.**

- Scan the patron's barcode and then enter the override date.
- Then scan the items to check out.

  Override dates are used for **exceptions** to the rules. They can be used to extend or shorten checkout for this one item, for this patron's current transactions, or with multiple patrons.

  Override dates **stay** until you change modes or clear them. To clear an override date, type **. <enter>**. (Make sure every attendee clears the override date before proceeding to the next example.)

  Override dates perform **different functions in different modes**. In **Check In / Out**, it is the new due date. In **Renew** mode, it is the new due date of the item being renewed. In **Bookdrop** mode, it is the date the item was returned. In **Statistics** mode, it is the date used to mark the usage. In **Inventory** mode, it is the last date the item was seen or inventoried.

- To clear an override date, type **. <enter>**.

E. Circulation Messages.

4. Check out *The Faber book of Christmas stories* **(3191) and** *Still more knock-knocks* **(3027) to Marijane Lou Coots (1036).**

Note the **message** that appears is accompanied by a **special sound**. Remember that sounds may not always be available so they should watch their screens for messages such as these.

This copy somehow managed to get back **on the shelf without being bookdropped** or checked in. Since it is in Marijane's hands, choose the default **Yes** to check in the item.

Notice that the **Transaction Log** shows that it was checked in from Todd Malta and then immediately checked out to Marijane. The item was not overdue, but if it had been and fines were accruing, a **Fine** window would appear.

It is important to note that the **default** in this message was **Yes**, check in the item. Scanning any barcode - patron or item - would have selected the **Yes** choice and checked the copy in from Todd. If your sounds did not work AND you were not paying attention to the screen, if you had scanned a third item that Marijane wanted, it would not have been checked out to her because the message was still on the screen at the time. **Remember to ALWAYS watch the screen.**

5. **Check out 3520, 3523, and 3072 to Joseph Todd Berol (1014).**

   The first item checks out to Joseph without incident but checking out the second item to Joseph would **exceed the policy** which only allows him to check out a maximum of three items at a time. If you are on the appropriate **security level**, you will see the message that allows you to cancel the check out or to override the policy and check the item out to him anyway.

   Cancel is the **default**. Pressing **<enter>** would cancel the check out. Scanning a third item would cancel the second item check out. *You CAN give away* **FREE** *items if you are not paying attention to the screen.*

   Override is the non-default action on this message. Pressing **<esc>** will perform the non-default action. Either click on **Override** or press **<esc >**.

   Type in the third barcode and watch as the message reappears. Overriding the policy **only applies to that one item copy** being checked out. It does not override for the entire session or day. You must override each item you desire to check out when the policy has been reached or exceeded.

   Click on **Cancel** or press **<enter>**. The item scanned appears in the **Current Item** pane but it still shows as available. The **Transaction Log** lists the item but it does not show that it was checked out even though the mode is **Check In / Out**.

   Type barcode `3520` (*Animal Farm*) which is an item we already checked out to Joseph just a few minutes ago. When you enter the barcode, look at your log. Because Joseph already had this item checked out, the Alexandria program assumed that he must want to check it in. Alexandria was written to streamline the processing. Often patrons will come to the Circulation Desk and say "I want to check out these items and check these in." There is no need to go to another mode to do so. Simply bring up the patron's record, scan the items to check in and then scan the items to check out.

   Again, ALWAYS watch your screen. If the patron had not already checked out this item, it would get checked out to him. There are multiple reasons this could happen. If your patrons already have the items checked out and they tell you they want to check them out, if you scan them in **Check In / Out** mode, it will check in their items - it will not renew them. ALWAYS watch the screen.

   NOTE: What the **Check In / Out** mode does depends on the status of the patron and the item. When the item is available, it will be checked out to the current patron when scanned in **Check In / Out** mode. When the item is checked out to the current patron already, it will be checked in when scanned in **Check In / Out** mode. When the item is currently checked out to a different patron, a message will appear that will allow the user to either check it in from the other patron and out to the current patron or leave it checked out to the other patron.

   NOTE: There is now a preference that will allow you to change the behavior of the **Check In / Out** mode. If set appropriately, Alexandria will warn you before it checks in a book in **Check In / Out** mode or it will not allow checkins during **Check In / Out** mode.

F. Patron Details.

Joseph has more items checked out than the two we just did. Click on **Details** in the **Current Patron** pane to see what else he has checked out.

The **Patron Details** shows you the patron's name, barcode, picture (if any), titles, barcodes, call numbers and due dates for items checked out, the fines and cost for overdue items, the titles on hold, the copies on in-stock hold, reservation, or reserve, and all the fines. In addition, some basic patron and statistic information and any attachments or notes are at the bottom.

1. **Tool.**

   (Looks like a hammer at the top of the vertical scroll bar at the right of the window.) Clicking on the **Tool** brings up a tool bar at the top left.

2. **Lock.**

   On the tool bar, click on the **Lock** icon to unlock a report.

3. **Ruler.**

   On the tool bar, click here to view the word processing tools.

Any time you see the **Tool** above the scroll bar, the window you are looking at is a **word processing window**. You can make changes to the on-screen report by highlighting the information to remove or change. You can click at the bottom and write a note before printing.

4. **Printer.**

   On the tool bar, click on the **Printer** icon to print or select **Print** from the **File** menu.

Closing the window and reopening it by clicking on **Details** again will return the report to its original format. There is no way to permanently modify a report in Alexandria. Close the **Patron Details** window.

G. Item Details.

Click on the **Details** button in the **Current Item** pane. It will show you the title, call number, medium, author, all the barcodes, their volumes, status, location, who currently has the copy checked out, when it is due, and the patron's location, any in-stock holds, holds, reservations, the title summary, the LCCN, and the ISBN. The copies are also color-coded - green is checked out, red overdue, purple in-stock hold, black is available or lost. Note the **Tool.** Close the window.

H. Bookdrop Mode (B).

To check in items with no possibility of accidentally checking out to another patron, use **Bookdrop** mode.

To check in multiple items:

- Enter **Bookdrop** mode by typing **B <enter>**, choosing **Start Bookdrop** from the **Circulation** menu, or scanning the **Bookdrop** command barcode from the sheet you were given.
- Set the override date for the date the copies were returned if different from today's date.
- Type or scan the barcodes of the copies to check in.
- Respond to any circulation alert messages that appear.

6. **Check in 3129.**

   Notice the **Current Patron** and **Item** panes show who checked out the copy and which copy was checked out.

   The **Transaction Log** lists the patron, the copy and when it was due.

7. **Check in 3637.**

   A **Fine** window will appear. Looking at the window you will see the patron, the item overdue, the amount of the fine, a place for an additional payment, a place for forgiving part of the fine, the total amount, and a place to pay the fine. The payment is highlighted and awaiting a payment amount. DO NOT scan a barcode into this field. You cannot pay more than is owed and you could get into a loop if you are not WATCHING the screen. You will also see a button to forgive the whole amount or to charge the amount listed minus the payment.

   Click on **Charge Fine** and notice the entry in the log.

8. **Check in 3085.**

   Look at the **Transaction Log** and you will see that this copy was **not checked out**. There are several reasons this could happen. First it could have sprouted legs and walked out - someone took it without checking it out. Second, someone may not have been watching the screen and gave away a **FREE** item.

   You will see at the right that even though the copy was not checked out the Alexandria program takes advantage of the fact that it was scanned and inventories the copy. Alexandria **inventories** copies whenever they are checked out or checked in. In Alexandria it date stamps the last time the program saw the copy. This date stamp is called the inventory date.

9. **Check in 3193.**

   A message appears stating that Paul Rockwell has a **hold** on this item. Click on OK. The **Transaction Log** shows that the hold is now an **in-stock hold**, meaning that Paul has until the indicated date to come to the library and check out this copy.

   An **in-stock hold** is against a very **specific copy**. No one else can check out this copy except for Paul. Checking out a different copy of the same item record or from a different item record with the same title does not remove the in-stock hold. If Paul does not check this out by the **expiration date**, the Alexandria program will automatically return the copy to circulation.

   Expiration dates for holds and in-stock holds are governed by the patron **policies**.

10. **Check in 3430.**

    The **Current Patron** and **Item** panes change to the new patron and item but the copy does not get checked out to the previous patron who had been current.

If time allows, let the attendees do the “Let’s Practice” section.

Circulation

3) More Circulation

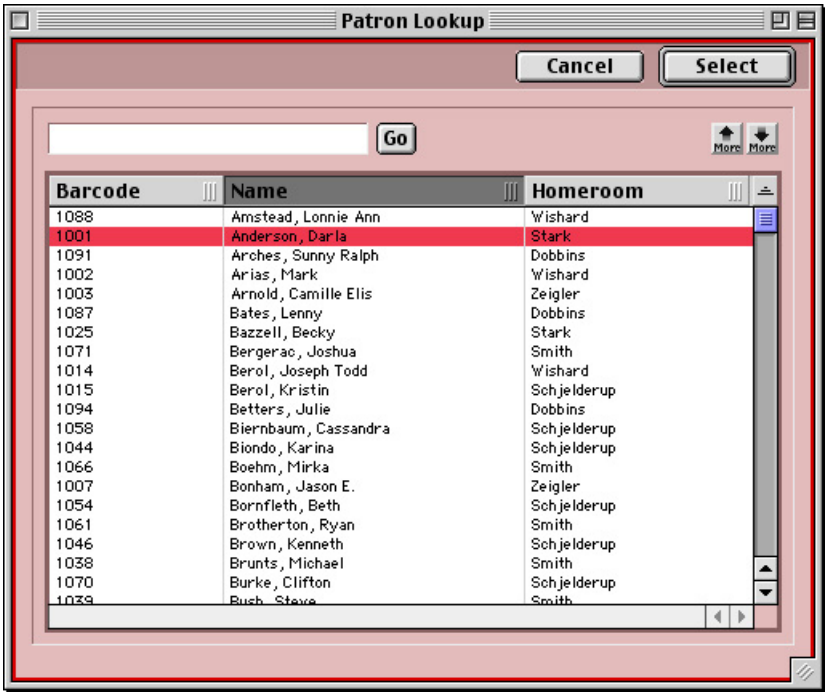
Estimated teaching time: 1/2 hour.

Estimated time for Let's Practice: 15 minutes.

A. Locate a Patron by Last Name (L).

To look up a student by name:

- Either click on the **Help** button and choose **Locate Patron** or type **L**.
- Type the student's last name and press **<enter>**.
- Click on the correct name to highlight it and then click **Select** or double click on the correct name.



1. **L Anderson Darla.**

   Darla appears as the current patron and can now check out items, place holds, reservations, reserves, etc.

   The **L** command lets you **locate** the patron by last name in a List.

   - When searching for a patron or item, you only need to type as much of the title or last nname to get to the general area on the **Browse** window. (i.e. And for Anderson) Use the two **More** arrow buttons to show you more selections prior to or after your search entry.

B. Locate an Item by Title (T).

To look up an item by title:

- Click on the **Help** button and choose **Find Title** or type **T**.

• Type the first part of the title and press **<enter>**.

• When searching for a patron or item, you only need to type as much of the title or last nname to get to the general area on the **Browse** window. (i.e. And for Anderson) Use the two **More** arrow buttons to show you more selections prior to or after your search entry.

• Click on the correct title to highlight it and then click **Select** or double click on the correct title.

2. **T World of Science.**

Look at the **Current Item** pane Notice that all copies are checked out.

The **Transaction Log**, however, does not show that the item was checked out to Darla Anderson even though the **Circulation** mode is **Check In / Out**. Searching for a titles using the **T** command only brings up the title and the first copy for viewing. It is now ready for viewing, placing holds or reservations or reserves for the current patron, etc.

C. Place a Hold on a Title (H).

To place a single hold:

• First scan or type in the patron's barcode to make him the current patron. (Or search for the patron by last name.)

• Next type the command **T** for **title** and type in the title of the item. Select the appropriate title.

• Next type the command **H= <enter>** in the command box to place a hold on the current title for the current patron.

To place multiple holds for a single patron:

• First scan or type in the patron's barcode to make him the current patron. (Or search for the patron by last name.)

• Next type the command **H <enter>** in the command box.

H <enter> changes the program to **Hold** mode.

• Next type the command **T** for title and type in the title of the item. Select the appropriate title.

• Type **= <enter>**. A hold will be placed on that item record.

NOTE: You can replace the title search and **=** command with typing or scanning a barcode.

3. **Type H=.**

Entering the **H=** places a hold on the current item for the current patron but leaves the **Circulation** window in **Check In / Out** mode.

The **=** command uses the current item barcode in the current **Circulation** mode.

Although a **barcode** must be used to place a hold from Circulation (either by typing the barcode number or using the **=** command), a hold is against the **item title** record. If multiple items have the same title, the hold is only against the title with the barcode used when placing the hold.

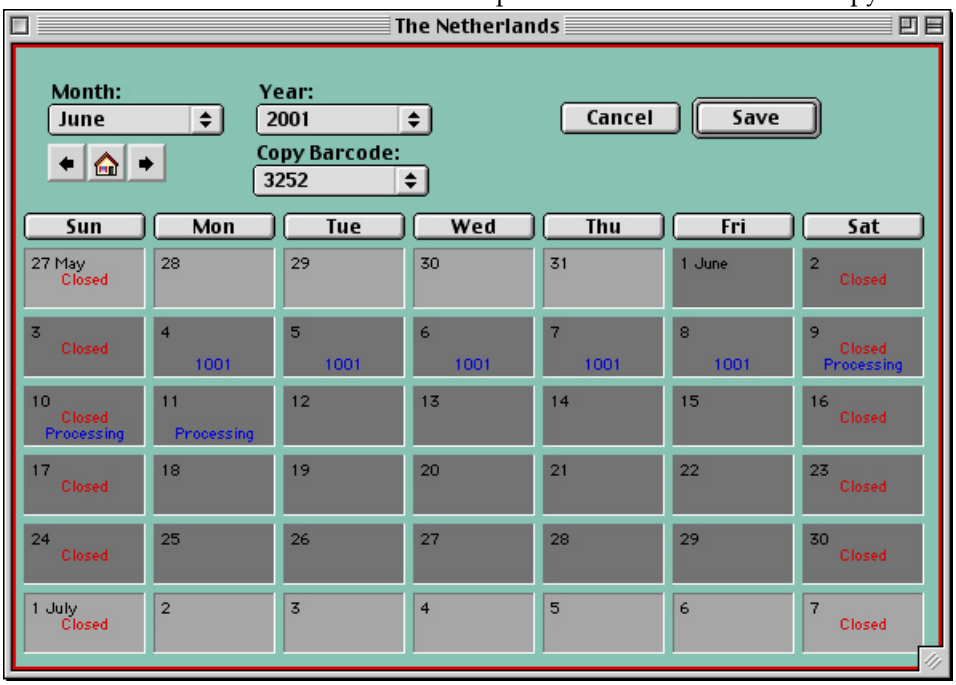
If one copy of that title is available, the hold becomes an **in-stock hold** waiting for the patron to pick up the item.

NOTE: Instead of the title search and **H=** command, you can type **H {barcode}**.

D. Place a Forward Reservation on a Specific Copy (G).

To create a forward reservation:

- First scan or type the patron's barcode to make him the current patron.
- Next type **G** and type or scan the barcode of the item on which to place the reservation.
- Click on the dates for the patron's reservation of that copy.



- Click **Save** when finished.

NOTE: You can replace the **G {barcode}** command with a **title search** and then a **G= <enter>**.

To place reservations on **multiple copies of the same item title**, simply change the copy barcode drop-down menu to a different copy and place the same reservation. Repeat for as many copies as are needed.

To place reservations on **multiple copies of different item titles**, you can type **G <enter>** to go to **Reservation** mode. Then scan the barcode of the first copy to have a reservation. Place the reservation and save. Scan the copy or type the barcode (or do the title search and the = command) for the second copy to have a reservation. Place the reservation and save. Continue for all the copies for reservation for the current patron.

4. Create a forward reservation for Keri Dobbins for item *Mars* **(3040) for the second full week of next month.**

You will have to **search** for Keri Dobbins by last name.

In this exercise, you have both the title and the barcode of the item Keri wants. You can **choose** any of the three sets of directions to teach depending on which you feel is more appropriate for your attendees.

Reservations are against **specific copies for specific days**. Only the patron who placed the reservation can check out that copy during the time of the reservation. If a copy with a reservation is not checked out before the reservation end date, the copy reservation will be **automatically removed** after the end date by the program and the copy will be available for check out.

E. Renewing an item (R, RA, QE).

5. Renew ***A week in the life of best friends*** **(3207).**

To renew a single item if the item is present:

- Type **R** for renew then type or scan the item barcode number.
- Type **`R 3207 <enter>`**.
- Notice that it shows that it was renewed by Jami Stark and it lists the new due date.
- Notice that the mode was not changed.

6. In Renewal mode, renew items 3190 and 3167.

To renew multiple items which are present:

- Type **R <enter>**.
- Notice that the mode was changed this time.
- Scan all the copies to renew.
- When finished, hit **. <enter>** to return to **Check In / Out** mode.
- Notice that the two items have been renewed.

7. Mark Arias would like to renew three of his books, but did not bring them with him. Renew *Case of the great train robbery, 10-5 Alaska skip,* **and** *Ed Emberley's Picture Pie* **using the QE command.**

To renew any item(s) that is not present:

- Enter the patron's barcode number.
- Type **QE <enter>** or select **Renew Patron Items** from the **Circulation** menu.
- Highlight the item(s) to renew.
- Click on **Renew**.
- Respond to any circulation messages that appear.

8. Todd Malta(1013) would like to renew all of his books, but did not bring them with him. Renew them using the RA command.

To renew all items for a patron:

- Enter the patron's barcode.
- Type **RA <enter>**.

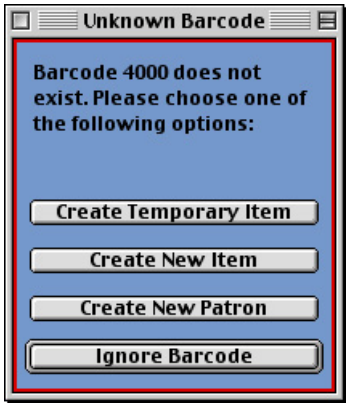
• Respond to any circulation messages that appear.

F. Adding items "On the Fly".

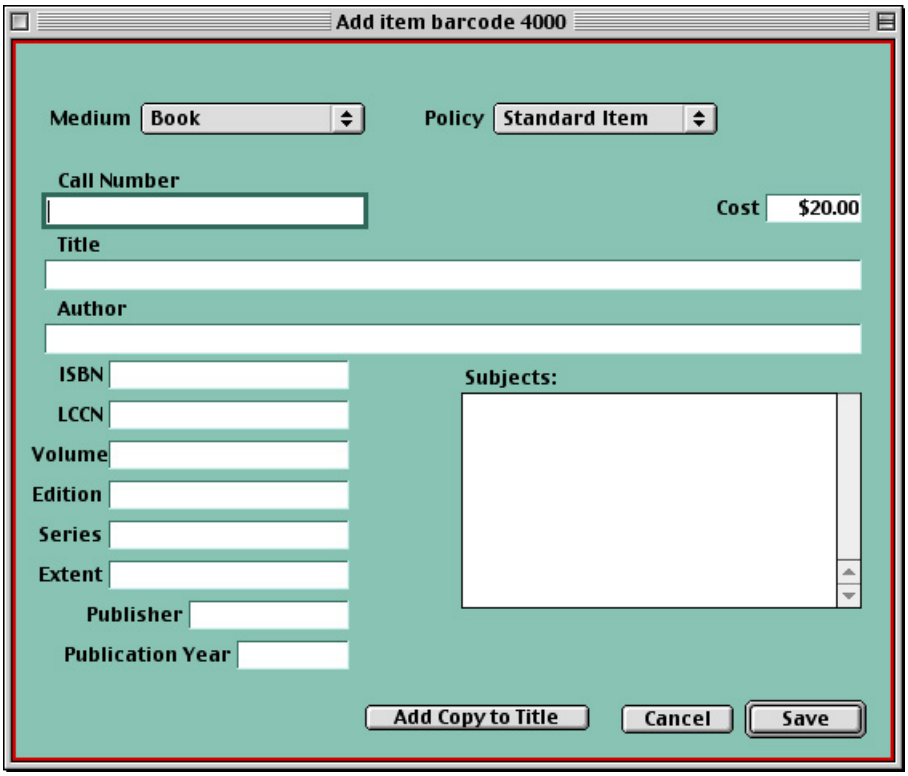
To add an item "**On the Fly**":

• Type or scan in the student's barcode number.

• Put a barcode on the item and type or scan it. The following window will appear.


Unknown Barcode
Barcode 4000 does not exist. Please choose one of the following options:
Create Temporary Item
Create New Item
Create New Patron
Ignore Barcode

• Click on **Create New Item**. This window appears.



• Fill in the fields you desire. A barcode, title and policy are required.

• Click on the **Save** button.

Use the **Add-On-The-Fly** procedure to do **brief entry cataloging**.

When used in **Check In / Out** mode, it will **automatically check out** the item copy added on-the-fly.

Any barcode that is not currently in the system can be used as a temporary item. **Temporary items** are automatically removed from the collection when they are checked in.

9. Add the hardback fiction book *Maniac Magee* by Jerry Spinelli with a barcode of 4000 and check it out to Tom Takippe (1029).

If time allows, let the attendees do the "Let's Practice" section.

4) Special Circulation

Estimated teaching time: 15 minutes.

A. Charging a Fee (F).

To charge a fee:

• First make the patron current by typing or scanning the patron's barcode or using the **L** command to find the patron by last name.

• Next type the command **F** for **fee**, then the fee amount, and the description of the fee. Press **<enter>** when the message is as desired.

1. Marijane Lou Coots returns *Still more knock-knocks* **(3027) with slight water damage. Charge her $3.00 for the damage.**

Bookdrop 3027.

Notice that Marijane is now the current patron and you can charge her the fee.

Type **`F $3.00 Water damage on book 3027`** **<enter>.**

Notice the **Transaction Log** shows the fee charged.

Click on **Patron Details** to see the fee charged and how it appears on the patron record.

To pay or forgive a fee or fine:

• First make the patron current by typing or scanning the patron's barcode or using the **L** command to locate the patron by last name.

• Choose **Make Charges and Payments** from the **Circulation** menu at the top of the window.

• Highlight the fee or fine to pay or forgive.

• Click on the appropriate button - **Forgive Charge** or **Make Payment**.

If you click on **Make Payment**, enter the amount the patron is paying. Then click on **Process**.

B. Declaring a Copy Lost (1).

To declare an item lost:

• In **Check In / Out** mode, type **1 <enter>.**

The **Lost Patron** will show as the current patron.

• Type the barcode of the copy that was lost. Remember to press **<enter>** after each barcode.

When declaring a copy lost by a specific patron, DO NOT check the item in first. Just check it out to the **Lost Patron**.

Don't forget to clear the lost patron when finished. Type **X <enter>.** Lost items are **not automatically deleted**. They show to the patrons as out in the **Search Results** and Lost in the **Item Details**.

To remove lost items you will need to run the global utility, **Remove Lost Copies**. You can select to remove the lost copies based upon the date lost.

2. Darla Anderson informs you that she lost her item *Polar Bear* **(3023). Declare it lost by checking it out to the Lost Patron and charge her the cost of the item.**

Charge Darla the full cost of the lost item.

Notice the **Transaction Log** shows the item was lost and how much Darla was charged.

C. Discard a Copy (2).

To declare an item discarded:

- In **Check In / Out** mode, type **2 <enter>**.
- The **Discarded Patron** will show as the current patron.
- Type the barcode of the copy that was discarded. Remember to press **<enter>** after each barcode.

3. *African Animals* **(3944) has worn out through such heavy use that it must be discarded.**

Don't forget to clear the discarded patron when finished. Type **X <enter>**.

Discarded items are **not automatically deleted**. They show to the patrons as out in the **Search Results** and Discarded in the **Item Details**.

To remove discarded items you will need to run the global utility **Remove Discarded Copies**.

Use the discarded and lost patrons to tag copies for removal later. Use these features when you must **account** at the year's end how many copies were lost or discarded and what was their worth.

To permanently remove all lost or discarded copies:

- As with any utility, run an archive or make a backup prior to running the utility to remove all discarded or lost items.
- Choose **Utilities** under the **File** menu.
- Select **Items** in the **Utility Type** drop-down menu.
- Select either **Remove Lost Copies** or **Remove Discarded Copies** as desired.
- Limit which copies to remove through the **Select By** drop-down menu as desired.
- Click on **Run**.

5) Patrons

Estimated teaching time: 1/2 hour.

Estimated time for Let's Practice: 15 minutes.

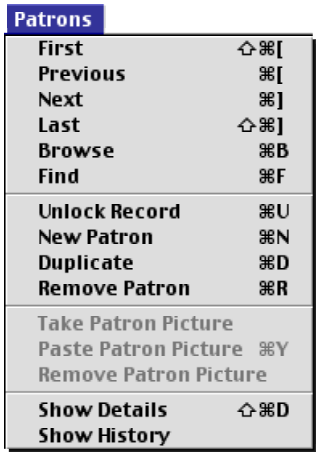
The **Patrons** module can be accessed by choosing **Patrons** under the **Show** menu. Options to modify patron records, add individual patrons, and remove individual patrons are located here. Patron history can also be accessed here if turned on.

A. Patron Window.

Before proceeding with the actual process of adding patrons, modifying patrons, or removing patrons, view the **Patrons** menu at the top of the window and quickly review the fields of the **Patron** windows. Make sure that you know what each field is for, how they can be modified or used, and which are required. Focus on the required fields and the fields appropriate to your attendees.

1. **Patrons Menu.**

   All commands that affect patrons are located in this menu. You'll see the options for browsing through your patrons, finding patrons, adding, modifying, removing, duplicating, adding and removing pictures, and viewing details and history.



2. **Lock / Unlock.**

   When the **Lock** is displayed, changes cannot be made to the record. When the **Unlock** is displayed, almost any field can be changed. An option to **Lock** or **Unlock** is also located on the **Patrons** menu at the top of the window. In addition a hot key of **<cmd-U>** (on Macintosh) or **<ctrl-U>** (on Windows) will toggle between the **Lock** and the **Unlock**.

3. **Previous / Next Arrows.**

   Click on the left arrow to go to the previous patron in the order specified by the **Browse By** drop-down menu to the right. Click on the right arrow to go to the next patron in the order specified by the **Browse By** drop-down menu to the right. The **Patrons** menu also has **Previous** and **Next** commands which are also linked to the **Browse By** drop-down menu. The **<cmd-(>**

(on Macintosh) and **<ctrl-(>** (on Windows) will browse to the previous patron. The **<cmd-)>** (on Macintosh) and **<ctrl-)>** (on Windows) will browse to the next patron.

4. **Browse By Drop-down Menu.**

   Choose from the drop-down menu the order in which to browse through the patrons. This drop-down menu also sets the drop-down menu in the **Find** window so be very sure to WATCH the screen. Invariably, a user will be browsing by patron barcode and then try to find by last name without changing the drop-down menu. Doing such a search with the wrong criteria can take you to the wrong patron. WATCH your screen.

5. **Patron Sequence Number.**

   The **Sequence Number** is the small black number on the top right of the window. It is similar to an accession number but it is assigned by the system. Sequence numbers may be reassigned during a rebuild.

6. **Barcode.**

   Barcode is a required field. Barcodes can be alphanumeric (all letters, all numbers, or a combination of both). They cannot contain punctuation or spaces. Barcodes must be unique and are required for both patrons and copies. When the window is unlocked, the barcode field is highlighted and ready for modification.

7. **Patron Policy.**

   Policy is a required field. Policies govern how many items can be checked out, how many overdue and still be allowed to check out, fine amounts, which items can be checked out or placed on hold, etc. Only two patron policies come with the system - **Standard Patron** and **System Patron**. **System Patron** is the policy for the special patrons like **Lost** and **Discarded**. You must have a patron policy each time the rules differ for a patron group.

8. **Status.**

   All new patrons default to active. Any active patron can check out based upon the patron's policy. When a patron with a status other than Active tries to check out, a warning message will appear to alert the librarian and provide the option of allowing check out or canceling.

9. **Sex.**

   Defaults to unknown for new patrons. Sex can be set to Male, Female or Unknown. Sex only shows on detailed reports but it can be imported and exported.

10. **Patron First Name.**

    Enter the patron's first name and any middle initials in this field.

11. **Patron Last Name.**

    The patron's last name is a required field. It can contain multiple words or hyphens.

12. **Address 1 and Address 2.**

    The address fields allow for a multi-line address such as a PO Box and street address or a suite number.

13. **City.**

    This should be the city of the patron's mailing address. However, on creation of a new patron from the **Patron Management** window, this field will default to the city specified in the **Library Information** preferences.

14. **State or Province.**

    Enter the state or province as it should be printed on a mailing label. On creation of a new patron, this field will default to the same state or province specified in the **Library Information** preferences.

15. **Postal Code or ZIP code.**

    Enter the postal code or ZIP code for this patron. By default when you are adding a new patron, this field will be filled with the same postal code or ZIP code from the **Library Information** preferences.

16. **Country.**

    When needed, fill in the country field for the patron.

17. **Picture.**

    When desired, either take the patron's picture or paste it in from a file. When that patron is current in Circulation, the picture will display in the **Current Patron** pane and on the **Patron Details**. Patron pictures can be imported from the **Circulation** window using the **zzpp** command if the pictures are in .jpg format, are named with the patrons' barcode numbers, and are located in the same folder or drive.

18. **Government ID.**

    This field is not required but must only contain information unique to this patron. Customize the field name for your country or needs in the **Patron Management** preferences. This field is used to match and update patrons during import if no barcode match is found.

19. **Community ID.**

    This field is not required but must only contain information unique to this patron. Customize the field name for your organization or library needs in the **Patron Management** preferences. This field is used to match and update patrons during import if no barcode or government ID match can be found.

20. **Location.**

    Location can be a room number, a teacher, school, or department. This field appears in most circulation reports and on the **Current Patron** pane. It is not a required field, however.

21. **Phone.**

    This is the primary phone number for contacting the patron. Additional phone numbers can be entered in the contact notes. This phone number will appear on many circulation reports.

22. **Fax.**

    If desired, enter the fax number here. Only prints on detailed patron reports.

23. **Email.**

    Although this field is not required, it is helpful since it allows overdue notices, in-stock hold notices, or recall notices to be emailed.

24. **Password.**

    Passwords are required and by default will be the patron's last name. Preferences for the **Alexandria Researcher** or **Alexandria Web** will determine if patrons are allowed to change their passwords. If the patron forgets his password, simply change it on this window and inform the patron of the change. Passwords are required for patrons to place their own holds or reservations, to check the status of their accounts, to renew their own items, and to update their addresses, phone numbers, or email addresses. (Which changes are allowed are all based on the **Alexandria Researcher** or **Web** preferences.)

25. **Graduation Date.**

    This field only appears if the **Library Information** preferences are set to **"This is a School Library."** When this is a school library, this is the date this patron will graduate from the last grade of school specified in the **Library Information** preferences. When the graduation date is set or changed, the grade will be calculated to match based upon the last grade of **School** preference.

26. **Level.**

    This field name can be customized in the **Patron Management** preferences. For school libraries, it usually should be called Grade or Year. When the Level equals PS (for Preschool) or JK (for Junior Kindergarten), K (for Kindergarten) or 1 through 12, the Alexandria program will automatically advance the patron to the next level based on the **End of School** preference - if the **"This is a School Library"** preference is checked. Any other levels will not be advanced at the end of the school year and no levels will be advanced if "This is a School Library" preference is not checked.

27. **Sublocation.**

    This field name can be customized in the **Patron Management** preferences. It does not appear on most major patron or circulation reports but it is a selection for patron reports, circulation reports, and patron utilities. Sometimes it is also a sort option.

28. **Card Expiration Date.**

    This field is required and is based upon the default patron policy. If you do not want to have cards expire or have to renew them frequently, change the patron policies to expire in 9999 days rather than the default of 365 days. Expiration dates can be changed or renewed through the **Patron** utilities.

29. **Birthdate.**

    When desired, enter the birthdate here. The birthdate only appears on detailed patron reports.

30. **Contact Notes.**

    This field is for additional contact information. Such information might include cell numbers, beeper numbers, additional email addresses, guardians, parents' names and numbers, etc.

31. **Categories.**

    Categories are a way to track patron groups or information that Alexandria does not currently provide a field for.

32. **Alert Notes.**
    Alert notes appear in the **Circulation** window any time that patron is the current patron, whether that be for checking out a copy, returning or renewing a copy, or simply for viewing. The alert notes appear at all levels of security access that are allowed to circulate.

33. **General Notes.**
    General notes only appear in the **Patron Management** window, the **Patron Details** and when the **Patron Notes** button is clicked. They are only accessible with the security level of Library Staff or higher.

34. **Keep Patron History.**
    When checked, Alexandria will record all copies the patron checks out and when those copies are returned. In **Patron Management** preferences, you can specify to keep history for all patrons in the database or you can check it here to keep it only for this patron. This box needn't be checked for Alexandria to track the last three people who checked out a copy or title.

35. **Statistics.**
    Basic information on the number of copies the patron has out, how many are overdue, how many holds, reservations, and reserves the patron has, and monthly checkout statistics are provided here.

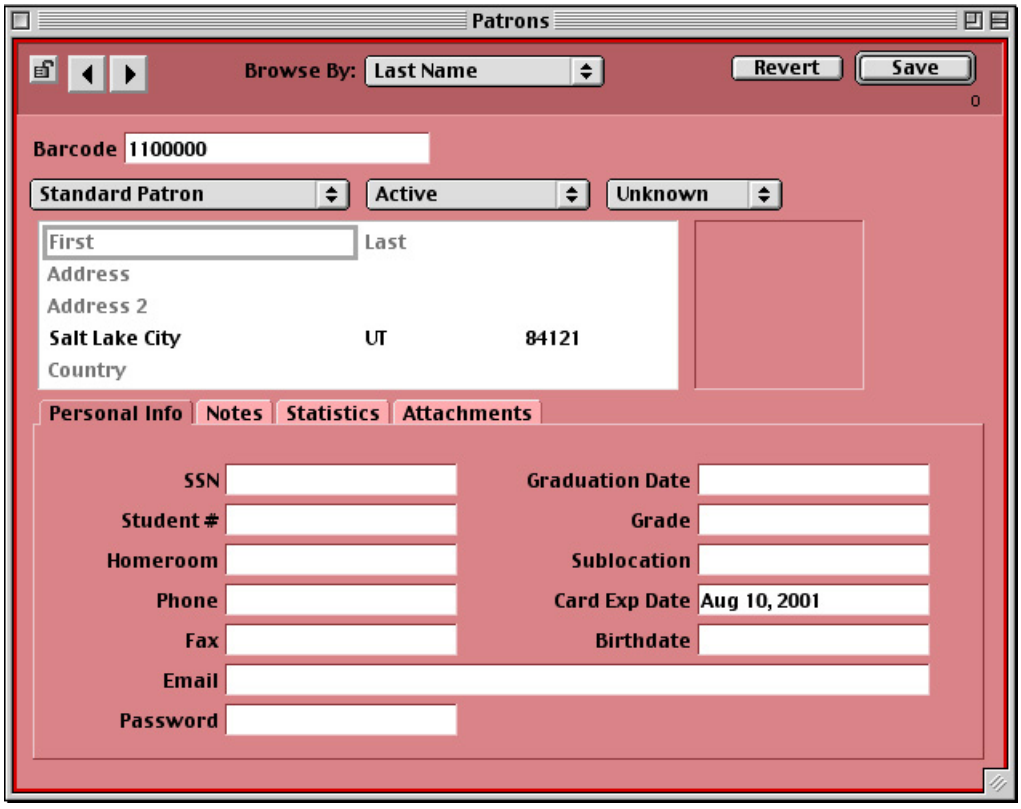
36. **Attachments.**
    This area allows you to add links to electronic documents such as web pages, pictures, movies, sounds, and documents. These attachments are only visible on the **Patron Details** windows or the **Patron Management** window. The patrons who have access to check their patron status can see and launch these attachments if they have access to the physical files and have the appropriate helper applications.

B. Adding Patrons.

To add a patron record:

- From the **Show** drop-down menu, choose **Patrons**.

• From the **Patrons** drop-down menu, choose **New Patron**. This window appears.



• Tab from field to field as you enter the information about this patron.

• Use the drop-down menus to indicate policy, status, and gender for the patron..

• Click the **Save** button.

1. **Add yourself as a new staff member.**

   Notice that Alexandria provides a barcode and a policy based upon the **Patron Management** preferences. The status and sex of the patron are set to the defaults Active and Unknown. You can change whichever settings you desire. Password, card expiration date, city, state or province, and postal code will also be entered depending on the preferences.You must enter at least a last name. Enter in all the desired information.

   Although Alexandria is not case-sensitive, the way you enter it is the way the information will display on reports and throughout the program. If you want the information to be visually pleasing, enter it in that way.

C. Modifying Patrons.

To find a patron record:

• From the **Show** drop-down menu, choose **Patrons**

• From the **Edit** drop-down menu choose **Find** or use the hot keys **<cmd-F>** (on Macintosh) or **<ctrl-F>** (on Windows). The window below will appear.

• Make sure the left drop-down menu has the desired search index.

• Type in the patron information to search for and press **<enter>**.

To modify a patron record:

• Find the patron to modify.

• Unlock the patron's record by clicking on the **Lock** icon or by choosing **Unlock** from the **Patron** menu.

• Make changes and click on the **Save** button.

2. Change Mitchell Miller's phone number to 253-3534.

Notice the **Find** window has a drop-down menu on the left that list the various patron fields that can be searched. This drop-down menu is linked to the **Browse By** drop-down menu from the **Patron Management** window.

The second drop-down menu on the **Find** window allows the user to indicate a closest match or an exact match search. With **Closest Match**, the user only needs to type as many letters or characters that come close enough. With **Exact Match,** if the information entered does not exist in the indicated index in exactly that format, the system will beep and stay on the current patron.

If a user tries to click in a field of a locked record, the system will beep and the lock in the upper left will flash red. No field can be activated or changed if the record is locked.

Notice the **Save** and **Revert** button at the top right appear when a change has been made. **Save** is the default. Pressing **<enter>** or **<return>** on the keyboard while the cursor is in a single line field will save the record. However, when the cursor is in a multi-line field, like the **Patron Notes**, the cursor will be moved to the next line. (NOTE: On Macintosh, the **<enter>** key on the number pad will always do the default action which in this case is save. On Windows, there is no difference between the **<enter>** on the keyboard and the **<enter>** on the number pad and either will move the cursor to the next line in a multi-line field.)

D. Deleting Patrons.

To remove a patron record:

• From the **Show** drop-down menu, choose **Patrons**.

• Find the patron's record.

• From the **Patrons** drop-down menu, choose **Remove Patron** or use the hot key **<cmd-R>** (on Macintosh) and **<ctrl-R>** (on Windows).

• Read the message on the screen.

• After reading the message if you desire to remove the patron and are allowed to remove the patron, click on **Remove**.

3. **Delete yourself from your patron list.**

   Patrons cannot be removed if they have items checked out. You must declare the items lost or check them in first. If they owe any fines or charges, you can remove them and their fines will be cleared from the system.

   For patrons who have no outstanding loans or fines, notice that the message says "Permanently remove this patron." If you click **Remove**, there is no undo.

If time allows, let the attendees do the "Let's Practice" section.

Alexandria

6) Items

Estimated teaching time: 1 hr.

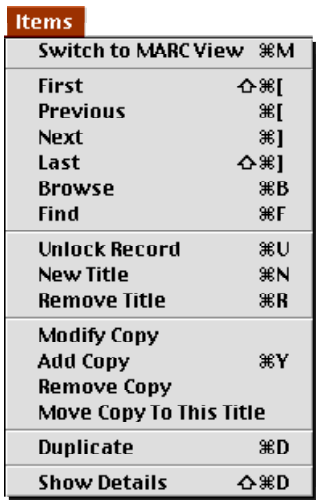
The **Items** module can be accessed by choosing **Items** under the **Show** menu. Options to modify title and copy records, add new titles and copies, and remove titles and copies are located here. Since Alexandria can be used to track and inventory more than just books, the term item and title are generally used interchangeably. **Item Management** is where cataloging occurs for all items and all media types (books, videos, equipment, etc.). Multimedia items, electronic files, and web sites are also cataloged here.

A. Item Window.

Before proceeding with the actual process of adding items, modifying items, or removing items, view the **Items** menu at the top of the window and quickly review the fields of the **Items** window. Make sure that you know what each field is for, how they can be modified or used, and which are required. Focus on the required fields and the fields appropriate to your attendees.

1. **Items Menu.**

   All commands that affect items are located in this menu. You'll see the options for browsing through your items, finding items, adding, modifying, removing, and duplicating items, and viewing the details.



2. **Lock / Unlock.**

   A title or a copy cannot be modified if the record is locked. This security feature can be disabled in your **Display Settings** Preferences if desired. When enabled, it will prevent you and others from making unintended changes. To unlock a record, click on the **Lock** icon at the top-left of the **Item** window to change it to an **Unlocked** icon OR press **<cmd-U>** (on Macintosh) or **<ctrl-U>** (on Windows) until the icon shows as unlocked.

3. **Previous / Next Arrows.**

   Click on the left arrow to go to the previous item in the order specified by the **Browse By** drop- down menu to the right. Click on the right arrow to go

to the next item in the order specified by the Browse By drop-down menu to the right. The **Items** menu also has **Previous** and **Next** commands which are also linked to the Browse By drop-down menu. The **<cmd-(>** (on Macintosh) and **<ctrl-(>** (on Windows) will browse to the previous item. The **<cmd-)>** (on Macintosh) and **<ctrl-)>** (on Windows) will browse to the next item.

4. **Browse By Drop-down Menu.**

   Choose from the drop-down menu the order in which to browse through the items. This drop-down menu also sets the drop-down menu in the **Find** window so be very sure to WATCH the screen. Invariably a user will be browsing by item barcode and then try to find by title without changing the drop-down menu. Doing such a search with the wrong criteria can take you to the wrong item. WATCH your screen.

5. **Item Sequence Number.**

   The **Sequence Number** is the small black number on the top right of the window. It is similar to an accession number but it is assigned by the system. Sequence numbers may be reassigned during **Rebuild**.

6. **Call number.**

   The call number can be either the Dewey or LC classification for the title. All portions of the call number - prefix, classification, and suffix - go into the field. (This field is keyworded.)

7. **Policy.**

   The item policy for this title governs who can check out, place holds, etc. for this item. Each new copy will default to the same policy as the title but can be changed. This is a required field.

8. **Medium.**

   This is the format of the item. The only medium that comes with Alexandria is book; to add a different type, click on the drop-down menu and select **Add NEW Medium**; to remove a medium type, use catalog utilities to change all instances of that medium type to a different medium type. This field is keyworded and used for selections and sorts. This is a required field.

9. **Title.**

   Put the title on the first line. If the title has a subtitle, enter it on a separate line starting with a colon (:). If the title has a statement of responsibility (I.E. “Edited by Isaac Asimov. Illustrated by Paul Zelinsky.”), enter it on a separate line starting with a forward slash (/). This field is keyworded as are other variant titles in the MARC record. However, this is the only title that will appear on the item details. **Title** is a required field when cataloging.

10. **Non-filing Characters.**

    This drop-down menu sets the number of characters to ignore when sorting and selecting by the title. Last character to ignore must be a non-alphanumeric character. (i.e. To ignore “The” set drop-down menu to 4. To ignore “An” set the drop-down menu to 3.) Alexandria will automatically ignore “A”, “An”, and “The” based upon the leading articles list in the **Item Management** preferences. If the “A”at the beginning of a title should not be ignored (i.e. “A is for apple.”, you will need to manually reset this drop-down menu to 0 characters to be ignored. This is a required field.

11. **Author.**

    This is the primary author of this item. Click on the **Author Editor** link to enter additional authors or illustrators (700 tag). This field is keyworded as are the additional authors or illustrators. All author tags are displayed in the **Item Details**.

12. **Volume.**

    The volume can be a number, letter, etc. but this field is not keyworded. It is visible in the **Item Details** for the librarian and the patrons.

13. **Edition.**

    The edition description (large print, 1st, American, etc.) is not keyworded but is visible on the **Search Item Details**.

14. **Publisher.**

    Enter the name of the publishing company or division. This field is keyworded.

15. **Publication Place.**

    This is the city, state, or country where published. This field is not keyworded.

16. **Year.**

    Enter the publication or copyright year. This field is keyworded.

17. **Series.**

    This is the traced series that will appear on the **Items Details** and on catalog cards. This field is keyworded. Other series tags in the MARC records are keyworded but do not display in the simple **Item Management** window or on the **Item Details**.

18. **Extent.**

    This is the physical description of the work; it can include the number of pages, illustrations, etc.

19. **LCCN.**

    The Library of Congress Catalog Number field is keyworded.

20. **ISBN.**

    The International Standard Book Number field is keyworded.

21. **Subjects.**

    This tab includes only the MARC 650 subjects. Each line is one single 650 subject and each column indicates a different subfield within that subject. The topical field is required when a subject exists. Here are examples of subjects and in which column they should appear (T - topical; G - general; C - chronological; GEO - geographic). The entire subject is keyworded in the ordered displayed as a full subject. Each individual entry in a column is keyworded as a subject term.

    U.S. -- History -- 1861-1865, Civil War -- North Carolina

    T - U.S.

    G - History

    C - 1861-1865, Civil War

    GEO - North Carolina

Literature -- 18th Century -- Spain

T - Literature

C - 18th Century

GEO - Spain

Spain -- Travel and Description

T - Spain

G - Travel and Description

• Alexandria uses the simple interface as a MARC template. Entering the subject subdivisions in the correct column will place them in the correct subfield of the MARC tag.

• The MARC record allows multiple general, chronological, and geographic subdivisions. A LC or Sears subject may have all or some of the subdivisions. Sometimes the LC or Sears subdivisions are not in the same order as Alexandria displays. Therefore, imported records that correctly use the MARC record subdivisions will display in the appropriate column indicating the subdivision but may not appear in the same order as the LC or Sears subject authority lists. Subjects that were not entered in the MARC record correctly may have all subdivisions crammed into the topical field but these will usually display in the same order as the LC or Sears subject authority lists.

• Since few librarians know how every subject in their data was entered in the MARC record, it is generally recommended that they teach their patrons and users to do all word searching rather than full subject or subject term searching.

• Other MARC tags and subfields.

For MARC-conscience librarians, other subject headings (600 Personal Name subjects; 651 - Geographic subjects; etc.) can only be imported or entered on the **MARC Editor** window. See the Library of Congress' web page for details on MARC tags, indicators, and subfields (http://www.loc.gov/marc/). (Most of these tags are keyworded.)

22. **Bibliography.**
Use this field for local lists - awards won, genres, etc. This field is keyworded.

23. **Curriculum.**
This field is for local classes or units that use these items. This field is keyworded.

24. **Interest Code.**
Use this field for the ages or grade levels where these items are appropriate reading material. (In order to be searchable any terms must be at least 2 characters long. i.e.Grade 01, Grade 02, Level 3.4, etc.) This field is keyworded.

25. **Content Notes.**
    Enter the names of titles and authors included in an anthology or compilation. This field is keyworded in the **All Words** index.

26. **General Notes.**
    This field is usually for information like "Includes index and bibliography." This field is also keyworded in the **All Words** index.

27. **Summary.**
    The summary, abstract or annotation of this title - what is this item about - belongs here. Use more of a narrative or prose description than the subjects. Many summaries include prominent characters, plot, time period, or subjects of the work. This field is also keyworded in the **All Words** index.

28. **Title Statistics.**
    This shows the number of copies on this title and how many are available; when the title was added, last used and modified; and how many times it circulated (month/year).

29. **Don't Show in Alexandria Researcher.**
    Check this box when this should only appear in the searches from Librarian Workstations and not from the OPACs, Researchers, or Web.

30. **Attachments.**
    Drag and drop OR click and type to add files, documents, sounds, movies, pictures, or web sites to this title. Double click on any attachment to edit the description. Attachments show on the **Item Detail** windows in **Circulation**, **Item Management**, and **Searching**. (Only URL's are visible from the Web.) When a user clicks on an attachment in any **Item Details** window, the helper application indicated in your system will launch and display (or play) that attachment. The description in this field is keyworded in the **All Words** index.

    Web URL's can be imported when they are in the 856 tag.

31. **Study Program Drop-down Menu.**
    Choose the appropriate study program your library or organization is using. Alexandria is preconfigured to work with Accelerated Reader and Reading Counts. Others can be added also.

32. **Interest Code Range Drop-down Menu.**
    Set the interest code range by setting the first drop-down menu to the lowest grade level and the second drop-down menu to the highest grade level for which this item would be of interest.

33. **Reading Level.**
    Indicate the reading level for this item here. This field will take numbers such as 5.4 or 5. Alexandria assumes that any number entered without a decimal point is a whole number.

34. **Point Value.**
    This field indicates the number of points a patron may receive in this study program with successful completion of this test.

35. **Test Number.**
    This is the test number that patrons should request for this study program after reading the item.

36. **Holding Code.**

    The library or organization that owns the test for this item.

37. **Copy Summary.**

    This area appears under the title and author fields in the middle of the window. Each copy is listed here with the copy number, barcode, status, collection and location.

    Double click on a displayed copy to view the copy fields.

38. **Barcode.**

    The barcode is the unique identifier for this copy. Barcodes can be alphanumeric (all letters, all numbers, or a mixture of both). This field is keyworded and is required when there is a copy to circulate.

39. **Copy Number.**

    This indicates which copy was purchased first, second, etc. It used to be a unique identifier in the physical card catalog era. This field is archaic and is not required.

The call number, policy, and volume are duplicated on both the title and the copies. Each copy will inherit this information and changes to it from the title so that the librarian will not have to enter it or change it manually for each copy. However, the copies can be changed individually to something different. Once a copy has been changed to differ from the title in any of these fields, it will always be labeled as different for that field. This means that changes to the same field of that title will never affect the changed copy. Use this feature when most copies circulate but one copy is reference. Give that one copy a reference call number and policy.

40. **Volume.**

    The volume number or letter for this specific copy may differ from the title.

    Since volumes are not keyworded, do not use copy volumes for subtitles of volumed sets. i.e. *The Encyclopedia of Mammals* may have *Aardvark to Cheetah* as its subtitle and not have a designated volume number. Do not put "Aardvark to Cheetah" in the copy volume - put 1 in the volume of the title and enter "Aardvark to Cheetah" in the subtitle field. Volume 2 in this instance should be a different title since it would have a different subtitle.

41. **Call Number.**

    The Dewey or LC classification for this specific copy should include all portions of the call number - prefix, classification, and suffix. This field is keyworded.

42. **Policy.**

    This is the policy for this copy. It governs who can check out, place holds, etc. for this copy. It may differ from the title but is required when there is a copy to circulate or catalog.

43. **Condition.**

    This is the physical condition (Unknown, New, Excellent, Good, Fair, Damaged, Unusable, etc.) of the copy and is required for each copy.

44. **Vendor.**

    List the agency, company, or person from whom this copy was purchased.

45. **Accession Date.**

    This is the date this copy was added to the collection. By default Alexandria will assign it the date the copy was imported or added. This field is keyworded -- must be in the form YYYYMMDD when searched.

46. **Collection.**

    Collection is the name or code of the library who owns the item.

47. **Location.**

    Location is the physical location (room, special shelf, building) where the copy is housed. If the copy is in the standard stacks, then leave this field blank. Only use this for the weird areas. This does display (along with the collection) in the item details so that both the librarian and the users know where to find the copy.

48. **Purchase Cost.**

    This is how much money it took to buy the copy. By default, if a copy is imported without a cost, Alexandria will assign the default cost listed in the item policy to which this copy is assigned.

49. **Replacement Cost.**

    Enter how much money it would take to buy the item today. On import, will be set equal to the purchase price unless purchase price is equal to $0.00, then it will be set equal to the average replacement cost indicated on the item policy.

50. **Funding Source.**

    Use this field to track where the money came from to buy the copy (account number, name of fund - PTA, Title II or Chapter VI).

51. **Inventory Date.**

    This is the date that the copy was last seen (January 1, 1904 is the equivalent of never been checked out or inventoried.)

52. **Copy Notes.**

    Copy Notes are accessible from Circulation, but do not require any user action until desired. This is ideal for listing damage notes, dates, and extent of the damage.

53. **Alert Notes.**

    Alert Notes appear whenever the copy is accessed in Circulation. This is the perfect place for messages like “Kit includes one book, one map and one CD.”

54. **Copy Stats Barcode.**

    This is a reminder of which barcode you are looking at.

55. **Copy Stats Copy Number.**

    This is a reminder of where this copy falls in the ranks.

56. **Checkout Count.**

    This is how many times this copy has been used (increments on check outs and statistics mode).

57. **Days in Circulation.**

    This is the total number of days the copy was out of the library.

58. **Date of Last Use.**

    This is the last date this copy was checked out or used in statistics mode.

59. **Checked Out By.**

    This records who currently has this copy checked out.

60. **Previous Check Outs By.**

    This lists the last 3 patrons who checked out this copy.

61. **Reservations Pending.**

    This is the total number of reservations outstanding.

62. **Last Modified.**

    This is the date when this copy was last changed either through circulation or modification of the copy information.

B. Locating Records.

The **Find** window will default to finding by the same field as is set in the **Browse By** drop-down menu.

To find a title or copy:

• Once Alexandria has been launched from the **Alexandria Data Station** or the **Alexandria Librarian**, choose **Items** from the **Show** drop-down menu.

• Set the browse order in the **Browse By** drop-down menu at the top left of the window.

This drop-down menu is linked to the **Find** window. Finding options include title, barcode, author, call number, ISBN, LCCN, policy, and sequence number.

• Choose either **Find** from the **Items** menu at the top of the window or press **<cmd-F>** (on Macintosh) or **<ctrl-F>** (in Windows).

• Type in the entry box the first several letters or numbers of the desired item.

• Click on the **Find** button or press **<enter>**.

NOTE: Punctuation can affect the search you do. If you do not find the desired item, try the same search without the punctuation.

NOTE: As titles may be cataloged incorrectly, if the title you are searching for starts with an article like a, an or the, and it was not found in your first search, try the search again with the article.

NOTE: Some searches, like barcodes, must include all letters or numbers of the desired item.

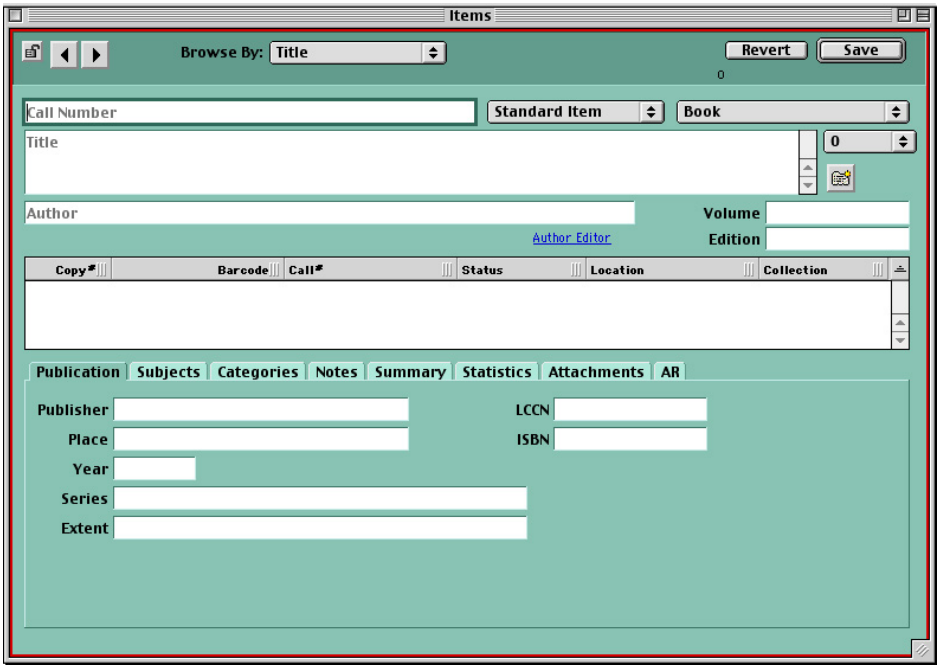
C. Adding Titles and Copies.

To add an item title record:

• Choose **Items** from the **Show** drop-down menu.

• Choose **New Title** from the **Items** drop-down menu.

• Fill in the appropriate fields in the **Items** window by tabbing between the fields.



• Click on the file tabs to move to **Publication**, **Subjects**, **Categories** and **Notes** tabs.

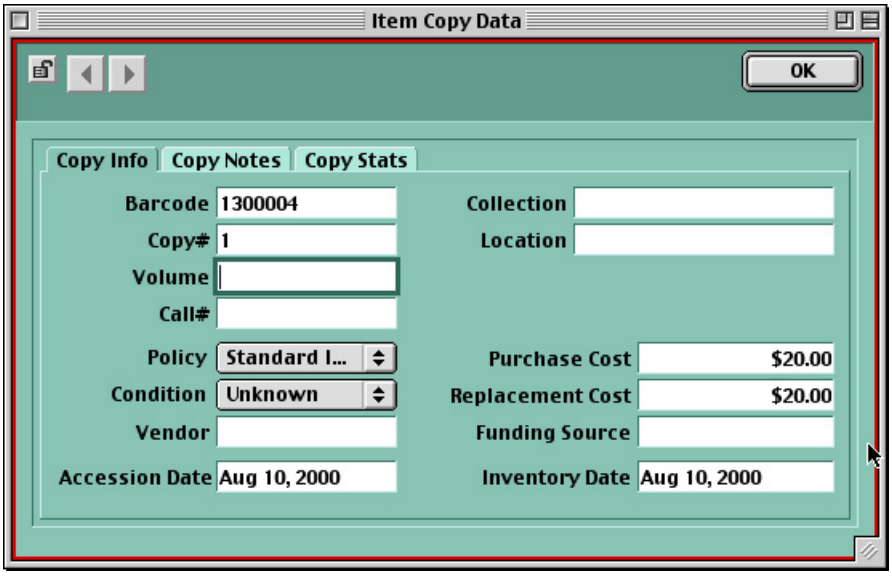
• When all the appropriate fields have been filled in, click on the **Save** button.

To add a copy:

• **Find** the title to which a new copy should be added.

• Choose **New Copy** from the **Items** drop-down menu.

• Fill in the appropriate fields in the window below by tabbing between fields.



- Click on the tabs to move to **Copy Info** or **Copy Notes**.
- When all the appropriate fields have been filled in, click on the **OK** button.
- Click **Save** on the **Items** window to save the copy changes to the record.

1. **Add the book,** *Across Five Aprils,* **by Irene Hunt with one copy.**

   Show the attendees that when they select a new title that Alexandria inserts a policy and medium type. These defaults are set in the **Item Management** preferences. Although title is the only field that they must fill in for the item to be valid, they may want to fill in more information and change the policy and medium to something different.

   Look at the **Policy** drop-down menu. Remind the users that policies govern who can check out this item, for how long, and if fines accrue or holds are allowed for this item. The only two policies that come with the Alexandria system are **Standard Item** and **System Item**. Any other policies must be created and entered in the **Policies** preferences.

   View the **Medium** drop-down menu and show the users that they can add new mediums here. Alexandria only supplies the medium, Book. All other mediums must be added by the user or imported with their data. Mediums are pulled from the 245_h subfield in the MARC record.

   Enter the call number, title and author.

   Click on **Save**. Notice that no copy is required.

   Add a copy and fill in the fields desired. When finished, click **OK** or **Save**. Notice the **Revert** and **Save** buttons available on the title. **Revert** will return the title to its previous state and **Save** will retain the changes made. Click on **Save**.

D. Modifying Titles and Copies.

To modify an item title record:

- Choose **Items** from the **Show** drop-down menu.
- Choose **Find** from the **Edit** drop-down menu.
- Search for the item.
- Unlock the title record, if necessary, by either clicking on the **Lock** icon or choosing **Unlock** from the **Items** menu.
- Make any desired changes to the record.
- Click on the file tabs to move to **Publication**, **Subjects**, **Categories** and **Notes**.
- When all the appropriate fields have been modified, click on the **Save** button.

To modify a copy record:

- Follow the steps above to locate and unlock the item title record.
- Double click on the barcode of the copy you wish to edit.
- Click on the file tabs to move to **Copy Info**, **Copy Notes**, or **Copy Status**.

• When all the appropriate fields have been modified, click the **OK** or **Save** button.

• Click **Save** on the **Items** window to save the copy changes to the record.

2. Add a second copy of *Murder in the Cathedral* **by Thomas Stearns Eliot.**

3. Change the call number of *Alaska* **by Allan Carpenter from 979.8 Car to 977.3 Car.**

E. Removing Titles and Copies.

To remove a title:

• You can't remove items that have copies checked out until they are declared lost or discarded.

• Follow the steps above to locate and unlock the item title record.

• Choose **Remove Title** from the **Items** drop-down menu.

• When asked if you wish to permanently remove the item, click on the **Remove** button.

To remove a copy:

• Follow the steps above to locate and unlock the item title record.

• Click once on the copy to remove.

• Choose **Remove Copy** from the **Items** drop-down menu.

• When asked if you wish to really remove the item, click on the **Remove** button.

Notice the **Revert** and **Save** buttons. Clicking on **Revert** will restore the removed copy. Clicking on **Save** (or pressing **<enter>**) will save the title without the removed copy.

• Click on **Save**.

4. Delete the item *Libya* **by Marlene Targ Brill.**

Since the item, *Libya,* has only one copy, use the **Remove Title** option on the **Items** menu. Make sure all users truly read the message that appears. The wording is intentional. It will **PERMANENTLY** remove the title. The default is **Cancel** rather than **Remove** so that the user has to specifically choose to remove the title and **ALL** the copies.

If you only want to remove a single copy or if you want to retain the MARC record for later use, then use the **Remove Copy** command. If you keep the title and there are no copies on the title, the title is still searchable by your users even though it is not available for check out.

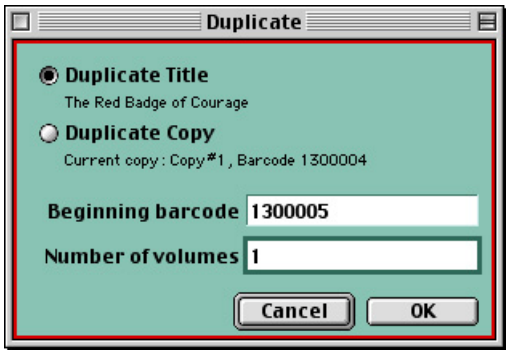
When a title is removed, Alexandria will show the next title in its place on the **Item Management** window.

F. Duplicating Titles or Copies.

To duplicate a title:

• Unlock the title record if necessary by either clicking on the **Lock** icon or choosing **Unlock** from the **Items** menu.

• Choose **Duplicate** from the **Items** drop-down menu. The following window will appear.



• Click the radio button next to **Duplicate Title**.

• Select the next barcode to use and the number of volumes to add.

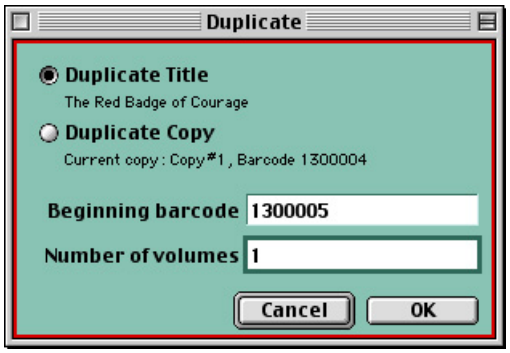
• Then click on **OK**.

Use this feature for multivolume sets where the publication information is basically the same. The **Number of Volumes** field is for how many more volumes you want added. A new copy will be added for each new volume.

To duplicate a copy:

• Unlock the title record if necessary by either clicking on the **Lock** icon or choosing **Unlock** from the **Items** menu.

• Choose **Duplicate** from the **Items** drop-down menu. The following window will appear.



• Click the radio button next to **Duplicate Copy**.

• Select the next barcode to use and the number of copies to add.

• Then click on **OK**.

Use this feature for multiple copies or classroom sets to add where the copy vendor, price, accession dates and funds are the same. The **Number of Copies** field is for how many more copies you want added to this item title.

G. MARC View.

To enter the MARC view:

• **Find** the desired item title in the **Item Management** window.

• Select **Switch to MARC View** from the **Items** menu.

To exit the MARC view:

• Select **Switch to Item View** from the **Items** menu.

To add a new tag to the MARC record:

• **Find** the desired item title in the **Item Management** window.

• **Switch to MARC View**.

• Click on **New Tag**.

• Enter the MARC tag number.

• Click **OK** or press **<enter>**.

• In the tag field, enter the subfield indicator and the subfield. (The subfield indicator in Alexandria is the _.)

• Enter the subfield information.

• To add more subfields, just enter the subfield indicator, subfield, and subfield information after the preceding subfields on the same tag line.

• Press **<enter>** when finished.

• Click on **Save** or press **<enter>** when all tags have been modified, added and removed as desired.

Since the MARC record is very particular, it is not recommended for the novice cataloger. All the fields on the simple **Item Management** window are linked to specific MARC record tags. Modifying, adding, or removing information from those simple fields will change the MARC record.

A basic rule-of-thumb is this: if you don't know a 245 from a 600 from a 740, then you should not use the **MARC Editor**.

To learn more about MARC records, tags, and subfields, go to http://www.loc.gov/marc. Click on Bibliographic and select the desired tag to learn about.

Items

7) Searching

Estimated teaching time: 45 minutes.

Choose **Search** from the **Show** menu on an **Alexandria Librarian** or **Data Station**. **Alexandria Researchers** automatically start on the **Search** window.

Although elementary and children's libraries may prefer the **Simple Search** or **Browse Search**, they are extremely limited and should only get a brief overview. You should focus on the **Boolean Search** instead since it contains features like **AND**, **OR**, **AND NOT**, and **THROUGH** searching, **WAN** searching, and the **Browse**.

A. Simple Search.

1. **Search Term Box.**
   Enter the word or terms to search for.
2. **Search Help.**
   Click here to learn more about searching.
3. **Big6.**
   Click here to review the Big6 steps and the questions to ask at each step.
4. **New Search.**
   Click here to return to a clean **Search** window.
5. **Authors.**
   When clicked, it will search for the indicated term in the **Author** index.
6. **Titles.**
   When clicked, it will search for the indicated term in the **Title** index.
7. **Subject.**
   When clicked, it will search for the indicated term in the **Subject** index.
8. **Call Number.**
   When clicked, it will search for the indicated term in the **Call Number** index.
9. **Series.**
   When clicked, it will search for the indicated term in the **Series** index.
10. **All Words.**
    When clicked, it will search for the indicated term in the **All Words** index. This is the default that will be searched when the **<enter>** key is pressed.

To search with the simple search:

- Type the word or words you wish to find in the **Search For** box at the top of the window.
- Click on the type of search you wish performed - **Title, Author, Call Number, Series, Subject,** or **All Words.**

NOTE: Remember that multiple words in the **Search For** box for an **All Words** search imply an **AND** search.

NOTE: For searches other than the **All Words** search, it is important to know that the information is keyworded as phrases only and not individual words. This means that performing a **Title** search, "Catcher Rye" will not return *Catcher in the Rye* because it does not start "Catcher Rye"; however, a "Catcher Rye" All Words search will return *Catcher in the Rye*. There is no such thing as a title or subject keyword index in Alexandria at this time. If the order the information is entered is unknown, then the All Words search should be used.

• If no results are found and preferences are set appropriately, you may be prompted to perform a **Sounds Like** phonetic search. Click **Yes** if you want the phonetic search performed.

• A **Results List** should appear. To sort the list, click on the sort order desired - Title, Author, or Call Number.

• Use the arrows at the right to scroll up and down through the list.

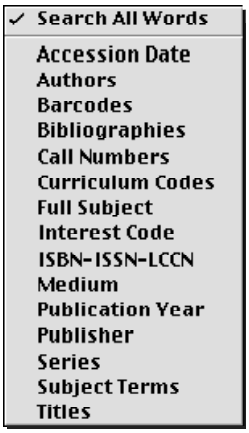
• Double click on a title to see more complete information on that item.

• When viewing the **Item Details**, you can click on any blue hyperlink to perform a search on that term - title, authors, subjects, series, etc.

• When viewing the Item Details, you can click on the **Previous** and **Next** arrows at the bottom of the window to browse through the item records.

B. Boolean Search.

1. **Search Term Box.**
   Enter the word or terms to search for.
2. **Search Help.**
   Click here to learn more about searching.
3. **Big6.**
   Click here to review the Big6 steps and the questions to ask at each step.
4. **New Search.**
   Click here to return to a clean **Search** window.



5. **Search All Words.**
   When selected, it will search for the indicated term in the **All Words** index.
6. **Accession Date.**
   When selected, it will search for the indicated term in the accession date index. Accession dates are stored in YYYYMMDD format (Y=year, M=month, D=day).
7. **Authors.**
   When selected, it will search for the indicated term in the **Author** index.
8. **Barcodes.**
   When selected, it will search for the indicated term in the **Barcode** index.
9. **Bibliographies.**
   When selected, it will search for the indicated term in the **Bibliography** index.

10. **Call Numbers.**

    When selected, it will search for the indicated term in the **Call Number** index.

11. **Curriculum Codes.**

    When selected, it will search for the indicated term in the **Curriculum** index.

12. **Full Subject.**

    When selected, it will search for the indicated term in the **Full Subject** index. Full subjects are created by Alexandria by combining all subfields of the MARC subject tags together with "--" between the subfields. The subfields will be pasted together in this way in the order in which they are stored which may differ from the Library of Congress or Sears order. Use the **Browse** to help in searching full subjects or use the **Subject Terms** search instead.

13. **Interest Code.**

    When selected, it will search for the indicated term in the **Interest Code** index.

14. **ISBN-ISSN-LCCN.**

    When selected, it will search for the indicated term in the **Catalog Number** index.

15. **Publication Year.**

    When selected, it will search for the indicated term in the **Publication Year** index.

16. **Publisher.**

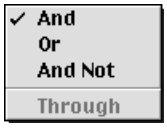
    When selected, it will search for the indicated term in the **Publisher** index.

17. **Series.**

    When selected, it will search for the indicated term in the **Series** index.

18. **Subject Terms.**

    When selected, it will search for the indicated term in the **Subject Terms** index. Subject terms are the individual subfields in a MARC subject tag.



19. **Titles.**

    When selected, it will search for the indicated term in the titles index.

20. **And.**

    When selected, the preceding and following search terms must be in each record returned.

21. **Or.**

    Located in the same drop-down menu as the **AND**, when selected, either the preceding **OR** following search term must be in each record returned.

22. **And Not.**

    Located in the same drop-down menu as the **AND**, when selected the preceding search term must be in each record returned but if the following search term occurs, the record is eliminated from the list.

23. **Through.**
    Located in the same drop-down menu as the **AND**, this operator is only available when not searching by All Words. This operator allows the user to search a range of the index. (i.e. call numbers 500 **THROUGH** 599.)

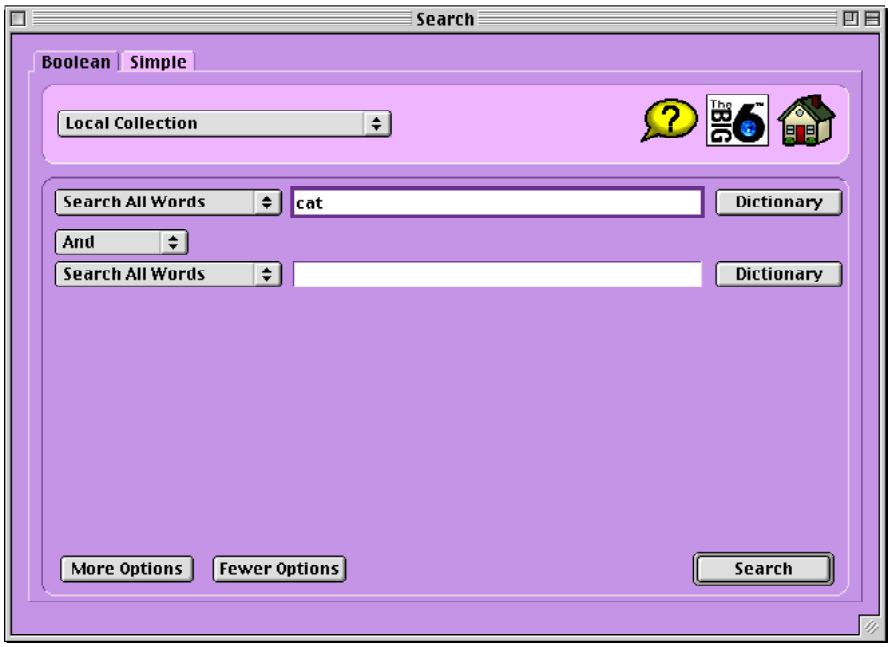
24. **More Options.**
    Click here to allowing searching by more terms than are currently available. Up to six different terms may be searched at one time.

25. **Fewer Options.**
    Click here to limit searching by less terms than are currently available. The default number of search terms is three. It is not necessary to click on fewer options when a user wants to only search by one term - just enter the single term to search to the first search term box.

26. **Browse.**
    Click here to view the entries for the index listed in the drop-down menu at the right.

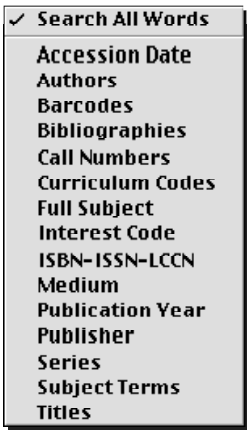
To perform a Boolean search:

- Choose **Search** from the **Show** menu.
- Click on the **Boolean** tab.



- Type the word or words you wish to find.

• Click on the arrow in the field that says **Search All Words** to select a type of search.



NOTE: Remember that multiple words in a search box for an All Words search imply an **AND** search.

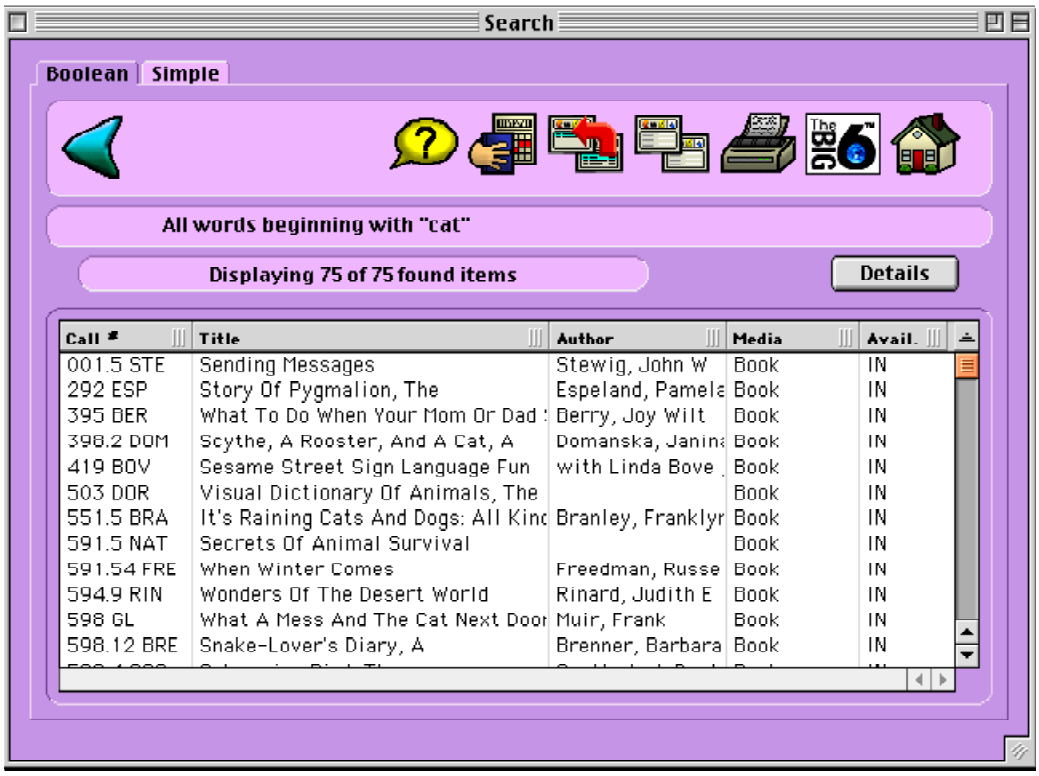
• Set the **Collection** drop-down menu to appropriate collection or group to search and click on the **Search** button or press **<enter>**. The default is Local Collection. Other collections are only available when the Alexandria **WAN** option is purchased, registered, and set up.

• If no results are found and preferences are set appropriately, you may be prompted to perform a **Sounds Like** phonetic search. Click **Yes** if you want the phonetic search performed.

• A **Results List** should appear. To sort the list, click on the column heading of the sort order desired - **Title, Author, Availability, Medium,** or **Call Number**.

• Use the arrows at the right to scroll up and down through the list.

• To view a title, highlight it and click on the **Details** button or double click on the title.


Search
Boolean
Simple
All words beginning with "cat"
Displaying 75 of 75 found items
Details
Call #
Title
Author
Media
Avail.
001.5 STE Sending Messages Stewig, John W Book IN
292 ESP Story Of Pygmalion, The Espeland, Pamela Book IN
395 BER What To Do When Your Mom Or Dad Berry, Joy Wilt Book IN
398.2 DOM Scythe, A Rooster, And A Cat, A Domanska, Janina Book IN
419 BOV Sesame Street Sign Language Fun with Linda Bove Book IN
503 DOR Visual Dictionary Of Animals, The Book IN
551.5 BRA It's Raining Cats And Dogs: All Kinc Branley, Franklyr Book IN
591.5 NAT Secrets Of Animal Survival Book IN
591.54 FRE When Winter Comes Freedman, Russe Book IN
594.9 RIN Wonders Of The Desert World Rinard, Judith E Book IN
598 GL What A Mess And The Cat Next Door Muir, Frank Book IN
598.12 BRE Snake-Lover's Diary, A Brenner, Barbara Book IN

• When viewing the item details, you can click on any blue hyperlink to perform a search on that term - title, authors, subjects, series, etc.

• When viewing the **Item Details**, you can click on the **Previous** and **Next** arrows at the bottom of the window to browse through the item records.

C. Browse Search.

Use this search to browse through the indicated indexes.

1. **Search Term Box.**
   Enter the word or terms to browse for.
2. **Search Help.**
   Click here to learn more about searching.
3. **Big6.**
   Click here to review the Big6 steps and the questions to ask at each step.
4. **New Search.**
   Click here to return to a clean **Search** window.
5. **All Words.**
   When selected, it will browse for the indicated term in the **All Word**s index.
6. **Title.**
   When selected, it will browse for the indicated term in the **Title** index.

7. **Author.**
   When selected, it will browse for the indicated term in the **Author** index.
8. **Full Subject.**
   When selected, it will browse for the indicated term in the **Full Subject** index.
9. **Subject Terms.**
   When selected, it will browse for the indicated term in the **Subject Terms** index.
10. **Series.**
    When selected, it will browse for the indicated term in the **Series** index.
11. **Call Number.**
    When selected, it will browse for the indicated term in the **Call Number** index.
12. **Bibliography.**
    When selected, it will browse for the indicated term in the **Bibliography** index.
13. **Curriculum.**
    When selected, it will browse for the indicated term in the **Curriculum** index.
14. **Interest Level.**
    When selected, it will browse for the indicated term in the **Interest Level** index.
15. **Browse List.**
    This list on the right side of the window changes when a different index is selected on the right. It lists approximately 20 terms before and after the term entered in the Search box at the top of the window. Scrolling to the top or the bottom entry in the list and pressing the appropriate arrow key will cause Alexandria to display an additional 20 terms in the list.

D. Study Program Search.

This search will only function if the items are cataloged with the MARC 526 Study Program tag. If the study program information is in some other MARC tag or Alexandria field, it will not be found unless it is also in the 526 tag.

1. **Study Program Drop-down Menu.**
   Choose the appropriate study program your library or organization is using. Alexandria is preconfigured to work with Accelerated Reader and Reading Counts. Others can also be added searched.
2. **Interest Code Range Drop-down Menus.**
   Set the interest code range by setting the first drop-down menu to the lowest grade level and the second drop-down menu to the highest grade levels that should be returned in the search.
3. **Reading Level.**
   Indicate the reading levels which should be returned. This field will take numbers such as 5.4 or 5. Alexandria assumes that any number entered without a decimal point should be a whole number.

4. **Point Value.**

   Indicate range of points an item test must be worth to be returned in the search list.

5. **Subject.**

   Enter subject terms here for limiting the list of study program items that should be returned.

6. **All Words.**

   Use this field to limit the items returned to only those containing the individual words. This is very useful if you do not know the subject you wish to search or if you have a specific author you wish to read.

7. **Search.**

   Click here to perform the search indicated.

E. Explore Search.

Alexandria Explore is an iconic search interface which can be configured by the librarians. It is an add-on to Alexandria and is not appropriate for a basic training. With its purchase comes approximately 130 windows with up to 15 predefined searches on each window. Please contact COMPanion if you wish to purchase Alexandria Explore or a training manual with exercises for teaching librarians how to configure it.

F. Beginning With vs. Exact Match Search.

1. Search for "cat" using the boolean search. Note the number of titles returned then search for "cat.".

A list of approximately 84 titles appear.

Search List icons:

- **Holds** and **Reservations**.

  Click here to enter a patron barcode and password to place a hold or a reservation.

- **Save List**.

  Click here to save all currently highlighted items to a NEW saved list. Such lists can be printed in various formats.

- **Clone**.

  Click here to save all items in the current list to a NEW saved list.

- **Print a Report**.

  Click here to select a report format. All reports appear on the screen first in a word processor. If the preferences allow, the generated reports can then be sent to the printer.

The search performed is listed in the second lighter box at the top of the window. Notice that when the user searches for "cat" the actual search performed is for all words beginning with cat.

Double click on *Sending Messages*. Find the word that starts with "c - a - t". This item talks about cattle brands. Other words that start with cat include cat, cats, catch, catches, catcher, catching, catharine, catholic, catastrophe, cataclysmic, cathedral, etc.

Click on the **New Search** (home) icon.

Type "Cat." and press **<enter>**.

The list drops from approximately 84 items to 32 items. Double click on any title and you will see that they all have words that equal "cat". Some titles like *Thump, Thump, Thump* have cat in a proprietary tag in the MARC record and it can only be viewed from **Item Management**, by clicking on the **View MARC** link at the bottom of the **Search Item Details** (only applicable when preference allows viewing MARC), or when a MARC report has been generated.

First Rule of Searching: When searching for short words or root words, an "exact match" search might be better than the default "beginning with" search. To make a search an exact match search, put a period after the search term. (i.e."cat.")

2. Search for subject term "Civil War". Compare results to an All Words search for "Civil War", and then "Civil AND War", and then "Civil. AND War.".

When you search for subject term "Civil War", a list of only ten items should appear. Double click on any item. Notice that Civil War appears in the subject after the --. The -- indicate a new subject term.

Also note that the subject term only has to begin with Civil War. The demo data has dates after "Civil War". If the user mistakenly searches for "Civil War.", only one would be returned because it has the only subject term that says "Civil War" without anything extra.

Do a new search for All Words "Civil War". Notice that 16 items are returned. All of the items are about the Civil War but change the search to "Civil **AND** War". This time 19 titles are returned because it does a beginning with on each individual word. Double click on *See Inside a Castle*.

Notice that it was printed by *War*wick Press **AND** has a subject term *Civil*ization. **All Words** cover all fields and the search words do not have to be next to one another.

Do a new search for all words "Civil. **AND** War.". Now the See Inside . . . titles disappear because they do not have words that are equal Civil **AND** equal War.

Unless the users and librarians know how every subject is entered in the data, they should teach their patrons the second rule of searching.

Second Rule of Searching: To get a more complete results list, use the Boolean search with an **All Word** search with one word in each search box. If you have to search subjects, then it is probably better to search subject terms rather than full subjects.

3. Search for Greek OR Roman AND Mythology. Then search for Mythology AND Roman OR Greek. Why in the second search does *Zorba the Greek* appear?

Enter Greek in the first search term. Make sure the search term drop-down menus at the left are still on **All Words**. Change the first Boolean operator from **AND** to **OR**. Type Roman in the second box. Make sure the second Boolean operator is still set to **AND**.

Type Myth in the third box and then click on the dictionary to the right of the third box. The dictionary will list all search terms for the **All Words** index. Look at all the search terms and how many items have the word mythology. Double click on Mythology.

Notice that by double clicking on the word Mythology Alexandria selected that word and typed it into the third search box.

Third Rule of Searching: Use the **Browse** button on the **Boolean** search to check the keyword list to make sure that the search term that was entered is a valid term in the Alexandria system. Also teach patrons for whom spelling or typing may be a difficulty how to use the browse to make searching easier.

Click on **Search** or press **<enter>**. A list will appear with 15 titles. Sort the list by title by clicking on the word title above the title column. Scroll down. The last title should be *The Warrior Goddess: Athena*.

Click on the **New Search** icon.

Change the search order to first search for Mythology. Make sure the first Boolean operator is set to **AND**. Enter Roman in the second search term. Set the second Boolean operator to **OR**. In the third search term enter Greek and then click on **Search**.

Nineteen items are returned with this search and when sorted by title, the last title is now *Zorba the Greek*.

Why? Each program that uses Boolean operators must decide which operator to perform first. The order in which the operations are performed is called the precedence order. In math, an equation like 2 + 4 * 6 will return different results if you do the + first or the * first. Math uses parentheses to force an order. There are no parentheses in Alexandria. The precedence order is top to bottom.

The first search looked for any item with the word Greek. It then added to the list any item with the words beginning with Roman (this would include romance, romantic, romanesque, Romanov, etc.). **AND** it only kept those that also had the word mythology. *Zorba the Greek* only has the word Greek so it was eliminated from the list.

The second search looked for any item with the word mythology. **AND** it only kept those with the words beginning with Roman. Finally it added any that had the word Greek. Since *Zorba the Greek* had the word Greek, it was acceptable in the list.

Fourth Rule of Searching: When doing a Boolean search of three or more search terms, when mixing **AND**s and **OR**s, the order of the search determines the results that you receive. When mixing ANDs and ORs, if there is one search term that should appear in every record, that search term should be the last thing searched for using the **AND** Boolean operator.

8) Save Lists

Estimated teaching time: 15 minutes.

A saved list is a list of selected titles and items which can either be printed or used for special reports or functions. Whereas a search results list may have all titles on the Civil War, a saved list can be created by the librarian or the patron to include only those titles that are written by women or are told from the female point of view.

A. Selecting Titles for a Saved List.

To Create a Saved List:

- Using either the simple search or Boolean search, find the items that are of interest.
- Highlight the items you wish to include on a saved list by either holding down the **<cmd>** key (on Macintosh) or the **<ctrl>** key (on Windows) and clicking on the desired items or holding down the **<shift>** key and clicking on the first and last items of a range of desired items.
- Click on the **Saved List** button.

1. Find Greek OR Roman AND Mythology. Sort list by title. Select every other title.

To select every other title, the users will have to hold down either the **<ctrl>** or **<cmd>** key and click on each title to save. Once all desired titles are selected, click on the **Save List** icon (has the red arrow on it).

B. Adding Additional Titles to a Save List.

- Perform the initial search and create a list of the desired titles using either the **Saved List** or **Clone** icon.
- On the **Search** window (not the **Saved List** window), click on the **New Search** icon.
- Enter another search using different search criteria.
- Highlight the items from the new search results list using the **<cmd>** or **<ctrl>** keys or the **<shift>** key.
- Either drag and drop those items on the desired saved list or copy and paste those items to the desired saved list.

  NOTE: You may have as many saved lists open and created as your machine's memory can support.

  NOTE: You can use the **Window** option on the menu bar to navigate between open windows in Alexandria. (i.e. If you have two saved lists created and have a **Search Results** window open, you will see **Search, Save List #1,** and **Save List #2** in the **Window** drop-down menu.
- Once the saved list is completed, sort the list as desired and then print the list or report.

2. Using the Window drop-down menu, return to Search and select titles 2 and 4 from the list.

• Click once on title 2. Notice that all previous selected titles are no longer selected. Hold down the **<cmd>** or **<ctrl>** key and click on title 4.

• Now choose **Copy** from the **Edit** menu.

• Using the **Window** drop-down menu, switch to **Save List #1**. (The number may be different if your attendees have been exploring on their own or if they made a mistake or closed their first **Save List** window.)

• Choose **Paste** from the **Edit** menu.

• An alternative to using copy and paste would be to position both the **Search** window and the **Save List** window in such a way that the white list portion of both is visible. Once all titles on the **Search** window have been highlighted as desired, drag from search window to the white portion of the saved list.

• NOTE: Clicking on the **Save List** icon again will create a completely new save list rather than adding to the previously created list.

C. Cloning Lists.

To clone a list or Search Results window:

• Find the desired items.

• Click on the **Clone** icon. A new saved list will be created with all the items from the previous window.

Use this feature when you need to do another search, but do not want to lose the current search list or saved list.

D. Removing Titles from a Save List.

To remove a title or several titles from a saved list:

• Find the saved list from which the title(s) should be removed.

• Highlight the desired item(s) to remove.

• Either **Cut** the items from the list using the **<cmd-X >** or **<ctrl-X>** keys, **Cut** from the **Edit** menu, or pressing the **Delete** key on the keyboard.

3. Sort the Save List #1 of Greek or Roman Mythology titles by Title. Remove all titles from *The Return of Odysseus* through *Tales of Pan*.

• Choose **Save List #1** from the **Window** menu.

• Click on **Title** to sort by title.

• Click once on *The Return of Odysseus*.

• Hold down the **<shift>** key and click on *Tales of Pan*.

• Press the **<delete>** key.

E. Printing a Saved List.

To print a saved list:

• Create or find the saved list to print.

• Click on the **Print a Report** icon.

- Select the desired format.
- Click on **Print**.
- When the report is finished generating, choose **Print** from the **File** menu.

4. **Print Save List #1 in MARC format without local information.**
   - Select **Save List #1** from the **Window** menu.
   - Click on the **Print a Report** icon.
   - While the **Report Selection** window is open, have the attendees view the possibilities.
   - Select **All Results** and **MARC** records.
   - Click on **Print**.
   - The report will be generated to screen.
   - Remind the attendees that this is a word processing document that they can modify before printing or saving. To save the document, simply click on the **Tool** and click on the **Disk** icon. To save as text for import at a later date or time, hold down the **<shift>** key when clicking on the **Disk** icon. Also mention that the **Save** and **Save As Text** options on the **File** menu will also work.
   - Do not save the document.
   -

Save Lists

Alexandria

9) Reports

Estimated teaching time: 15 to 30 minutes.

Since a wide variety of reports are available in Alexandria, it is recommended that you run at least one patron report, one item report, and one circulation report. Suggestions are provided but may be changed as necessary to meet the needs of the attendees.

A. Report Menu.

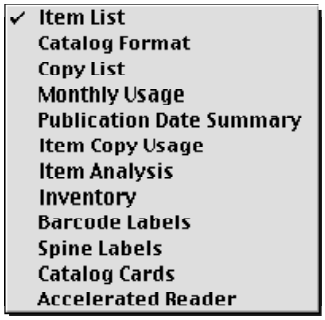
1. **Special Reports.**

.

2. **Patron Reports.**

3. **Item Reports.**

.

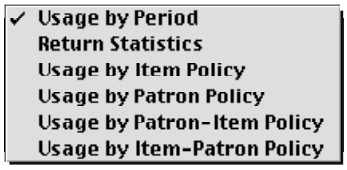


4. **Circulation Reports.**

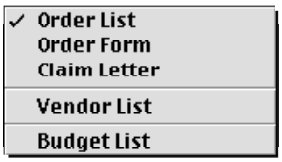
.

5. **Usage Statistics.**

.



6. **Order Reports.**



7. **Subscription Reports.**

.

8. **Quick Reports.**

Quick reports can be created from any standard report listed above. Create quick reports for reports that are run frequently. Simply select the report name, format, sort order, and the selection criteria and then click on **Create Quick Report**. Name the report and it will show in the **Quick Report** list.

B. Report Window.

1. **Report Name.**

Click on the arrow of this drop-down menu to see more report options.

2. **Format.**

Depending on the report selected, this drop-down menu may appear with various formats.

3. **Sort By.**

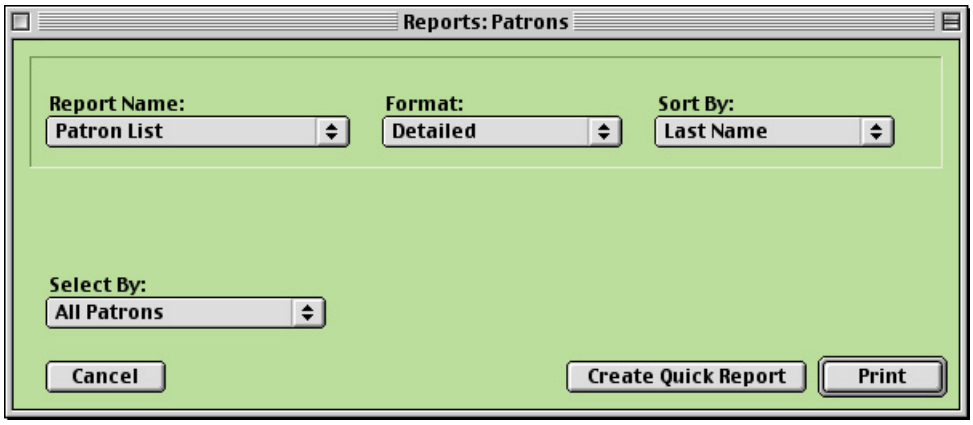
The sort options are determined by the report selected. Major subdivisions in sorting (like grade, policy, and location) may result in a page break between each category. Such page breaks can be removed manually before printing the report.

4. **Select By.**
   Limit the information that appears in the report based upon criteria such as the patron policy, an item barcode range, transaction dates, etc. Change the **No Selection** drop-down menu to **And** to further limit the information or an **Or** to add a different selection criteria.

5. **Description.**
   Some reports like barcodes may allow the user to modify the description.

1. **Print to the screen a one line list of all the patrons sorted by last name.**
   To print a list of patrons:

   - Choose **Patron Reports** from the **Reports** drop-down menu.
   - Choose **Patron List** in the **Report Name** drop-down menu.



   - Choose the format **1 Line**.
   - Choose **Sort By Last Name**.
   - Choose **Select By All Patrons**.
   - Click on the **Print** button.

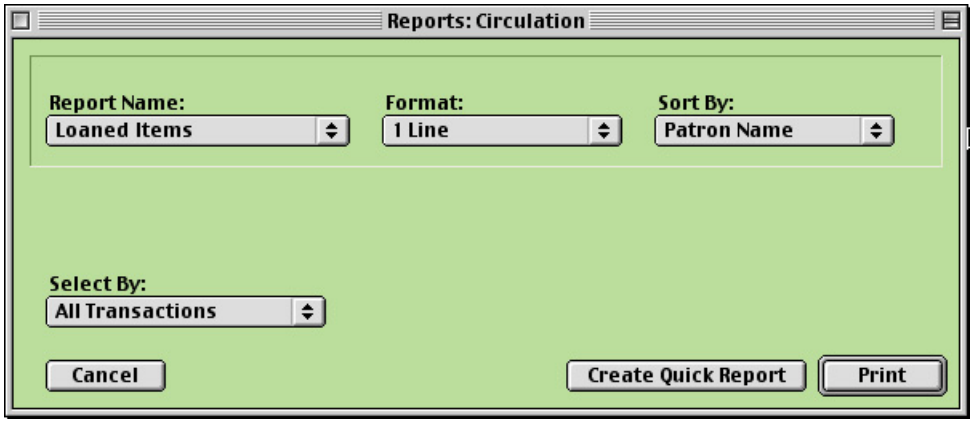
   Remind the attendees that all reports print to the screen first so that they can be modified before sending them to the printer.

C. Editing Reports.

2. Print a list of loaned items for all transactions sorted by location or homeroom.
To print a loaned items report:

- Choose **Circulation** from the **Reports** drop-down menu.

• Choose **Loaned Items** in the **Report Name** drop-down menu.



• Choose **1 Line** under the **Format** drop-down menu.

• Choose **Sort By Patron Location** (or **Homeroom**).

• Choose **Select by All Transactions**.

• Click the **Print** button.

• When the report has been created on the screen, edit as desired.

• Choose **Print** from the **File** drop-down menu.

Show the attendees the **{break}** symbol. This indicates where a new page will start. Click on the **Tool** icon and unlock the report. Click on the **Ruler** icon to show more formatting options.

Click on the beginning of a line following a **{break}** symbol. Press the **<delete>** key to remove the page break.

Highlight a different **{break}** symbol and change the font size (located on the **Ruler** at the top of the window) to size 6. Notice that it is still there, but very hard to read. You may see this small {break} on barcode reports or other reports formatted for special paper.

D. Limiting Reports.

3. Run a copy list - 1 line, sorted by call number for all your reference items.

To run a copy list selected by call number:

• Choose **Item Reports** under the **Report** menu.

• Click on the **Report Name** drop-down menu and select **Copy List**.

• Click on the **Format** drop-down menu and select the desired format.

• Click on the **Sort by** drop-down menu and select the desired sort order.

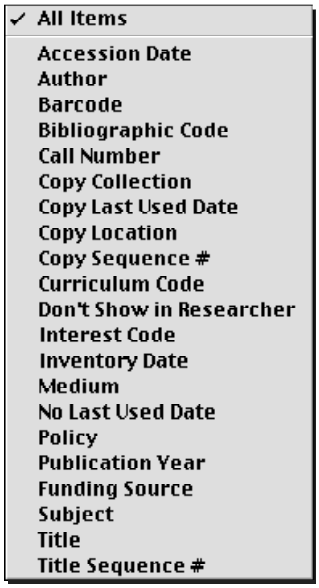
• Click on the **Select by** drop-down menu and choose **Call Number**.

• Enter the call numbers of the items to appear on the report. To select reference items only, enter REF (or R) in the **Starting With** box. There is no need to enter an ending with call number if you want all call numbers starting with REF.

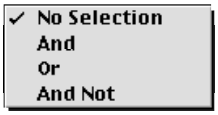
• Click on **Print**.

- Edit the report as desired.
- To print to the printer, select **Print** under the **File** menu or click on the **Print** icon on the **Tool** bar.

In this area, although we suggest selecting by call number, take the time to view the other possible selections to limit what appears on the report.



Also note the additional drop-down menu that appears when a criteria other than **All Words** is selected. This drop-down menu will allow more criteria to be selected when set to something other than **No Selection**.



Reports

Alexandria

10)Policies and Preferences

Estimated teaching time: 30 minutes to 2 hours.

As preferences are a strongly personal area and can provide endless variety of options and combinations, only a few of the major areas are covered in this manual. Refer to the user's manual for more detail on other preferences. Be prepared to adjust your training to answer the questions of the attendees or to cover areas that are not mentioned here but are appropriate to their situation.

To access **Policies** and **Preferences**, choose **Preferences** from the **Edit** drop-down menu.

A. Administration, Address Books, Updates, Services.

On the **Administration** tab, create users with their own personal passwords. Each user that logs on will be listed in the transaction log. At least one library administrator and one researcher login should be created for security purposes.

Remember that the **Data Station** must be running in order for people to search. If the patrons have access to the **Data Station** when the librarian is not present in the library, they should restart Alexandria and log in as a researcher so that people can only search and cannot add, remove, or modify patrons, items, or transactions.

None of these take affect until **Use Passwords / Security** is checked and Alexandria's restarted.

B. Advanced Bookings.

This tab governs the settings for the add-on module **Advanced Bookings**. This module automatically processes reports and checks out reservations for an indicated date range. **Advanced Bookings** is a potential topic for a training session for those institutions that have purchased this module.

C. Alexandria Researcher.

Set the default search interface that should appear when the **Researcher** is started or reset.

Make sure that there is a configuration password set. Without a configuration password patrons can change the colors of the **Researcher** to black and the sounds to Uh-oh. They can turn on the ability to print, check status, change addresses, etc. The default configuration password is "Configure". This can be changed but do not leave this field blank.

D. Archive.

Archives are a complete copy of your data to the hard drive of the **Data Station.** Archives do not replace backups. While an archive is occurring, all other services (like checking out and searching) are discontinued.

E. Calendars.

Calendars govern when items are due. Except for manually set override due dates and overnight check outs, items cannot be due on a closed day. To close a single day, click once on the day to close. To open a day, click on the day until **Closed** and **Period Due** disappear. To close all the Wednesdays for the month, select the month desired using the arrow keys or the month drop-down menu (make sure you are in the right year) and click on the column header Wed. To close all Fridays for the year, go to January of the appropriate year, then hold down the **<alt> (<option>)** key and click on the column header Fri and answer the corresponding question appropriately.

1. On the Standard Calendar, for next year close all of July and August and set a period due date for the third Friday in May. Duplicate the calendar and name the duplicate Staff. Change the period due date on the Staff calendar to the first Friday in June.

Period Due dates can be set for the end of the year when all items must be returned. Items will circulate normally until the due date would pass the period due date. If the policies state that period due dates apply, then the due date will be adjusted to the period due date. (This feature can also be used to ensure that most items are returned before major holidays, before inventory season, or before a major move.)

Notice that there is a button for creating new calendars. You can specify in the patron policies which calendar to use for that policy. If you have a staff or faculty policy, they may have different open and closed days or need a different period due date. Create a new calendar, choose whether to duplicate the current calendar, and set the dates appropriately. Don't forget to set the corresponding policies to use the correct calendars.

F. Circulation, Statistics, Letters, Miscellaneous.

G. Display Settings, Miscellaneous.

Change the colors on this window and turn off or delay tool tips in the miscellaneous preferences. Do not turn off the auto lock or turn on the auto save features for the database unless the users are extremely advanced - without auto lock you can make unwanted changes to your data and auto save will not ask if you really want to save those changes.

H. Item Management, Catalog, Leading Articles.

Specify the next barcode to use and default policies and medium types. On the **Leading Articles** tab, indicated the articles that Alexandria should automatically ignore at the beginning of titles and series when they are manually cataloged or searched.

I. Library Information, Email, School.

Be sure to fill in the library's address and email settings. (The email settings must be entered in order to email Technical Support from within Alexandria and to email notifications to the patrons.)

J. Orders, Claim Letter.

K. Patron Management.

Change the terminology of patron fields, if necessary, to customize the program for the librarians' situations.

L. Policies - Patron, Item, Circulation.

Policies govern how many items a patron can check out, how long they can be checked out and what the fines are, etc. A patron policy must be created for each patron group that differs in their circulation rules. (i.e. Staff have a different period due date and longer check out time.) An item policy must be created for each item group that differs in their circulation rules. (i.e. Only Staff can check out videos.) Policies are also used in the usage statistics reports; so even if there is no difference between the circulation rules, if you need statistics based upon time, patron or item, policies are the best way to obtain those statistics.

On the **Patron** stab, you would create and enter the general rules for each patron group. On the **Items** tab, you would create and enter the general rules for each item group (what is acceptable most of the time). On the **Circulation** tab, you make the exceptions to the rules. Select the patron and item combinations that need the exceptions. (i.e. On the **Patrons** tab create a Staff policy; on the **Items** tab create a Video policy which cannot be checked out; on the **Circulation** tab, select Staff checking out Videos and set the number of days to check out to 7. Every other patron group will still get 0 days check out except for Staff.)

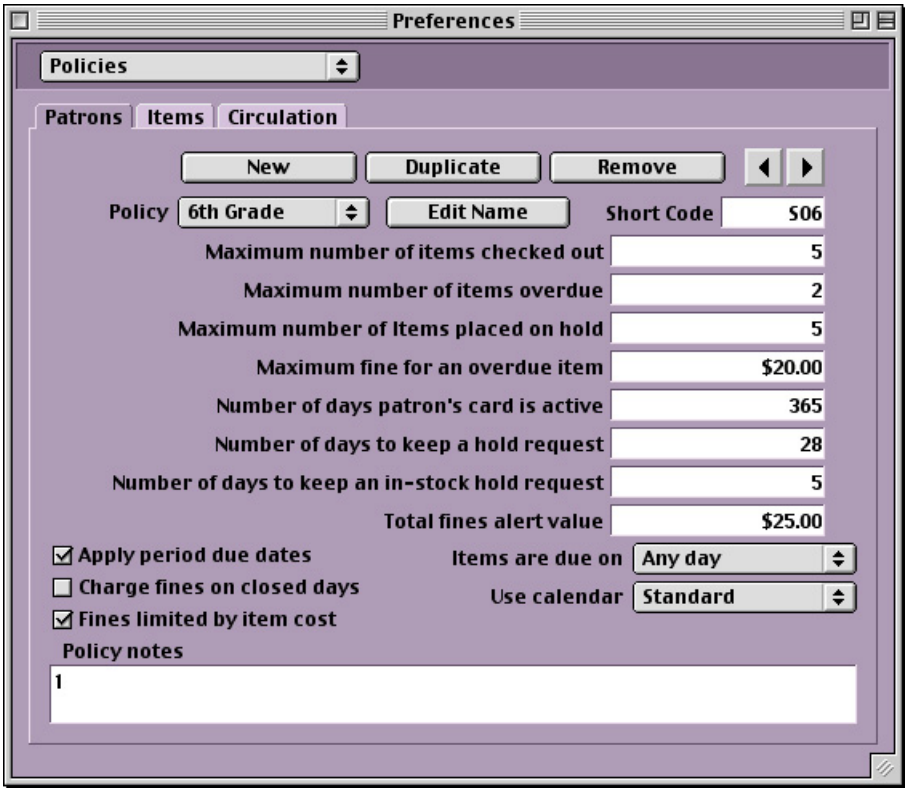
2. Set up a patron policy for 6th grade students with the policy code of S06. Set the policy so 6th grade students can check out a maximum of 3 items and can only have one item overdue. Let the students have 2 items on hold. Set the maximum fine for $5.00. Assume you do not want the students' cards to expire for 3 years. Allow a hold to exist for 35 days but an in-stock hold request to exist for 7 days. Apply period due dates for 6th graders, but don't charge fines when library is closed.

To create a new patron policy:

- Begin by choosing **Preferences** from the **Edit** drop-down menu.

- Click on the arrow by the **Administration** field and choose **Policies**.

- Next click **New** on the **Patron** tab.
- Enter in the patron policy name and code. Press **<enter>** or click **OK**.



- Tab between fields as you create the policy.
- When you have completed the policy, click on the **Save** button.
- To close the window, click on the close box on the upper left or press **<cmd-W>**.

Once a policy has been created, it must be assigned to a patron or item in order for it to be of any use. It can be assigned in the **Patron** or **Item Management** windows on a one-by-one basis, from circulation using the **UI** or **UP** Circulation commands, or globally using the **Utilities**.

Alexandria will not automatically assign policies based upon grade, call number range or medium type to the corresponding patrons or items. All patrons or items will be assigned the default policy specified in the **Preferences** or **Import** window when they are added. These can be changed.

Just to reiterate, if you create a fiction policy, Alexandria will not put any of the fiction items on that policy. You must either find each fiction title, unlock the title and change the policy yourself, OR choose to replace the item policy in **Utilities**, selecting by call numbers starting with FIC, OR go to **Circulation**, type **UI <enter>**, select the Fiction policy and scan each copy to change to that policy. Also, running the utility will not apply to future fiction items entered; it only applies to items currently in the data.

3. Change the policy to allow Staff members to check out Reference Items for 3 days and to always use the Staff calendar whenever Staff check out.

To modify a circulation policy (used when exceptions must be made):

- Begin by choosing **Preferences** from the **Edit** drop-down menu.
- Click on the arrow by the **Administration** field and choose **Policies**.
- Next click on the **Circulation** tab.
- Select the patron policy and the item policy combination for the exception to be made.
- Change the field values as desired for those patrons checking out those items.
- When you have completed the changes, click on the **Save** button.
- To close the window, click on the close box on the upper left or press **<cmd-W>**.

M. Routes.

N. Sounds.

Sounds are a local preference, meaning that each machine running either a data station or an **Alexandria Librarian** can have different sounds for the same event.

O. Web.

These preferences are only applicable if the **Alexandria Web** module has been purchased and registered.

P. Word Processor.

These preferences only apply to new user-created documents. They do not apply to Alexandria's reports.

11)MARC Appendix

A. MARC Basics:

There are three basic parts to a MARC record. These are tag, indicator, and subfield. A **tag** is the three-character numeric label for the different data fields in a MARC record (i.e. title, author, subject, etc.). The **indicators** are the first two characters of information that are entered in the data field. They help interpret and supplement the data in the field. For example, in the data field for title the second indicator is used to determine the number of characters that should be ignored in the case of a leading article such as a, an, and the. The **subfield** is the two characters which precede each section of information included in the different data fields. For example, in the 245 tag which is title information, _a represents the subfield for the title of the book and precedes the title in the MARC record.

B. Alexandria MARC Editors:

When looking at the **Title**, **Author**, and **Subject Editors**, the user will notice three icons. These are **+**, **a**, and **-**. The **+** is used when a new tag is desired. A window with a drop-down comes up allowing the user to select which related tag to add to the record. For example, when entering a record for *Rough-faced girl*, you may want to add *Cinderella* as a uniform title so that patrons can find that title when searching for *Cinderella*. In the **Title Editor**, you would select 730 Uniform Title from the drop-down menu. then enter Cinderella in the _a subfield. The **a** is used to add a subfield. As with the **+**, it brings up a drop-down. For example, when adding an illustrator to an item record, you may wish to add the information that they are the illustrator of the book. You can do this by first adding a tag (discussed above) of 700. Then, click on the a and select _e from the drop-down and then enter the abbreviation Illus. to the record. The **-** is used when you desire to remove a full tag. If you desire to remove the information in a subfield simply delete the information in the subfield to be removed and then the next time you open the editor it will only show the tags and subfields with entries in them.

C. Title Editor:

1. **245 - Title Statement (Not repeatable)**

   Enter the name of the book along with subtitle and statement of responsibility.

   _a: Title - The name of the book or item.

   _b: Remainder of title - This is the subtitle field (*Anne Frank: Diary of a young girl*).

   _c: Statement of responsibility - Type in the name of the author and illustrator, etc.(i.e. By Don and Audrey Wood).

   _h: Medium - Also known as the GMD.

2. **246 - Varying Form of TItle (Repeatable)**

   This tag is used to enter a form of the title on different parts of the item or an alternate form of the title from what is in the 245 tag.

   _a: Title proper/Short title - The varying form of title for an item. (i.e. *One hundred one dalmations*).

   _e. Rutan & Yeager for the title Dick Rutan & Jeana Yeager)

_h: Medium - Also known as the GMD.

_b: Remainder of title - This is the subtitle field for the varying form of the title (*Jaguar: Tale of the cat*).

3. **730 - Added Entry - Uniform Title (Repeatable)**

- Enter title information here to indicate a uniform title (i.e. *Bible, Mother Goose, Cinderella*, etc.).

_a: Uniform title - The uniform title entry.

D. Author Editor:

1. **100 - Main Entry - Personal Name (Not repeatable)**

This tag is used to indicate the name and other information for the main author of a work.

_a: Personal Name - The name of the author is entered last name, comma, then first name.

_b: Numeration - This is where you would indicate if a number is associated with an author's name (i.e. Louis XVI).

_c: Title(s) - Indicate if a title is associated with the author (i.e. Dr. or Pope).

_q: Fuller form of name - Used to show a fuller form of a name where _a contains initials.

_d: Dates of birth - and death if deceased.

2. **700 - Added Entry - Personal Name (Repeatable)**

Extra authors or illustrators can be entered using this tag. This makes them searchable under a work along with the primary or main author.

_a: Personal Name - The name of the person is entered last name, comma, then first name.

_b: Numeration - This is where you would indicate if a number is associated with an author's name (i.e. Louis XVI).

_c: Title(s) - Indicate if a title is associated with the author (i.e. Dr. or Pope).

_q: Fuller form of name - Used to show a fuller form of a name where _a contains initials.

_d: Dates of birth - and death if deceased.

_e: Relator term - Use this to indicated the added person's relationship to the item being cataloged (i.e. illus.).

E. Subject Editor:

1. **600 - Subject Added Entry - Personal Name (Repeatable)**

Use this tag when adding a subject entry using a personal name..

_a: Personal Name - The name of the person is entered last name, comma, then first name.

_b: Numeration - This is where you would indicate if a number is associated with person's name (i.e. Henry VIII).

_c: Title(s) - Indicate if a title is associated with the person (i.e. King, Emperor of France, etc.).

_q: Fuller form of name - Used to show a fuller form of a name where _a contains initials.

_d: Dates of birth - and death if deceased.

_v: Form subdivision - indicates genre (i.e. Fiction).

_x: General subdivision.

_y: Chronological subdivision - The time period it took place.

_z: Geographic subdivision - The setting in which it took place.

_2: Source of heading or term (i.e. Sears).

2. 610 - Subject Added Entry - Corporate Name (Repeatable)

Use this to indicate a corporation or jurisdiction name as a subject (i.e. Titanic, Salvation Army, United States, etc.).

_a: Corporate or jurisdiction name (examples above).

_v: Form subdivision - indicates genre (i.e. Fiction).

_x: General subdivision.

_y: Chronological subdivision - The time period it took place.

_z: Geographic subdivision - The setting in which it took place.

_2: Source of heading or term (i.e. Sears).

3. 650 - Subject Added Entry - Topical Term (Repeatable)

This tag is used to indicate a subject which is a topical term (i.e. Cats).

_a: Topical term or geographic name as entry.

_v: Form subdivision - indicates genre (i.e. Fiction).

_x: General subdivision.

_y: Chronological subdivision - The time period it took place.

_z: Geographic subdivision - The setting in which it took place.

_2: Source of heading or term (i.e. Sears).

4. 651 - Subject Added Entry - Geographic Name

Enter geographic location as a subject term.

_a: Geographic name or place (i.e. Hawaii).

_v: Form subdivision - indicates genre (i.e. Fiction).

_x: General subdivision.

_y: Chronological subdivision - The time period it took place.

_z: Geographic subdivision - The setting in which it took place.

_2: Source of heading or term (i.e. Sears).

MARC Appendix

Alexandria v5 Circulation Commands

AS — **Start Self Service Check Out Mode**

B *{Item Barcode}* — **Set Bookdrop Mode**
B3000 - Bookdrops just item 3000

C *{Call Number}* — **Locate a Title by Call Number**
C100.34 - Look for Call Number 100.34

E *{Subscription Code}* — **Receive Subscription**

F *{Amount }{Comment}* — **Record a Fine or Fee**
F3.25 Book Club - Record Book Club fee of $3.25

G *{Item Barcode}* — **Place a Forward Reservation**
G3000 - Reserve item 3000
GG - Set to Reservation Checkout Mode

H *{Item Barcode}* — **Place a Hold Request for a Title**
H3000 - Place a Hold on item with barcode 3000

I *{Date}* — **Set Inventory Mode**

IB *{Date}* — **Set Inventory / Bookdrop Mode**

J *{Item Barcode}* — **Reserve Request**
J3000 - Place a Reserve on item 3000

K *Item Barcode* — **Recall Item**
K3000 - Mark item 3000 for recall

L *{Name}* — **Locate Patron**
LJones - Locate patron with last name Jones

M *{RouteCode}{= Item Barcode}* — **Issue Routing Slip**

NC *Item Location* — **Set Location for Item Copies**

NP *Patron Location* — **Change Patron Location (homeroom)**
NP R301 - Mark Patron Location R301 for the next patrons

O *Barcode* — **Automatic Overnight Checkout of Item**

P *Patron Barcode* — **Set Patron**

Q *{Barcode)* — **Patron or Item Status**

QE — **Show Renew Window**
May select which items to renew

R *{Item Barcode}* — **Start Renewal Mode**
R3000 - Renew item 3000

RA — **Renew All**

T *{Title}* — **Locate Item by Title**
TBambi - Locate Bambi

UI *{ItemPolicy Code}* — **Change Item Policy**

UP *{PatronPolicy Code}* — **Change Patron Policy**

UR — **Restore Previous Policy**

V *Category Keyword* — **Catalog Items (Assign Keywords)**

X *Barcode* — **Make Patron or Item Current or Clear**

Y — **Start Statistics Mode**
Computes statistics as a 1-day checkout. Use for "in-library" usage.

Z — **Clear Transactions List**

.mm/dd/yyyy — **Set Override Date**

/*Old Barcode* **=** *New Barcode* — **Change Barcode Number**

.. — **Set Check In / Check Out Mode**

. — **Clear Override Date or Mode**

= — **Use Current Item Barcode**

***** — **Import Transaction File**
Use to import from a portable reader.

+ — **Show Patron Notes**

++ — **Show Item Notes**

+++ — **Print Transaction List**

Training Evaluation

School:_____District:_____ _____

Date Trained:_____Trainer:_____

Product: Alexandria SmartMARC Textbook Tracker eLunchroom

Version:_____ Type of Training: (Please circle) Basic Advanced

I have been using this product since:_____

I feel my computer skills are: Beginner 1 2 3 Advanced

Trainer Preparation: (Please circle) Poor Good Excellent

Trainer Presentation Skills: (Please circle) Poor Good Excellent

I liked best:

Could have been better:

I wish we had covered:

Things we (school, district, library, institution) could have done better to improve the training:

Comments:

Thanks for your input.

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